



# STRONGER TOGETHER



# 2012 BAIRD FOUNDATION ANNUAL REPORT



**BAIRD**



“WHEN WE SHARE OUR TIME,  
TALENTS AND PHILANTHROPIC  
CONTRIBUTIONS WITH ONE ANOTHER,  
WE BUILD COMMUNITIES THAT ARE  
TRULY STRONGER TOGETHER.”

# A MESSAGE FROM PAUL PURCELL AND STEVE BOOTH

Giving back to the communities where we live and work has been an integral part of Baird's culture since our founding in 1919. Starting with Robert Wilson Baird himself more than 90 years ago, countless Baird associates have devoted themselves to community involvement, sharing their energy and expertise with the organizations they support.

We're proud to carry on that long-standing tradition today. Many of our associates hold leadership positions in civic and charitable organizations. Others devote their time to causes they believe in, both on their own and through firm initiatives such as the Baird Cares program and Baird Gives Back Week, an annual event that creates collaborative volunteering opportunities. During our 2012 Baird Gives Back Week, more than 1,300 associates and their families donated 3,700 hours of their time to nonprofit organizations across the United States, Europe and Asia.

Baird Foundation is proud to support associates' passion for serving our communities. In 2012, the Foundation

gave more than \$2.7 million to deserving nonprofit organizations, including matching donations in support of associates' personal contributions.

Truly remarkable things can happen when, across our communities, people team up to lend a helping hand to those in need. When we share our time, talents and philanthropic contributions with one another, we build communities that are truly stronger together.

All our best,



Paul E. Purcell  
Baird Chairman, President & Chief  
Executive Officer



Steve G. Booth  
Baird Chief Operating Officer

## ABOUT BAIRD FOUNDATION

Baird Foundation reinforces and energizes Baird's legacy of community involvement. In cooperation with Baird's mission – "to provide the best financial advice and service to our clients and be the best place to work for our associates" – Baird Foundation's Statement of Purpose embodies the strategic focus behind the Foundation's gifts, our commitment to supporting local communities and Baird associates' dedication to serving others.

## STATEMENT OF PURPOSE

**BAIRD FOUNDATION SUPPORTS NONPROFIT ORGANIZATIONS ALIGNED WITH OUR FOCUS ON THE ARTS, EDUCATION, HEALTH AND HUMAN SERVICES AND DIVERSITY. OUR FOUNDATION SEEKS TO SUPPORT ORGANIZATIONS WHERE OUR ASSOCIATES ARE ACTIVELY ENGAGED IN ORDER TO MAXIMIZE OUR IMPACT ON THOSE ORGANIZATIONS AND OUR COMMUNITIES.**

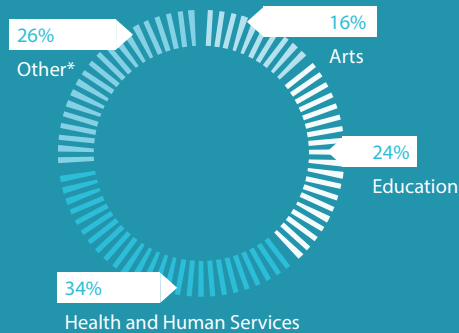
## SUPPORTING ASSOCIATES' DEDICATION TO SERVING OTHERS

Many Baird Foundation gifts are granted in support of requests made by Baird associates who have a special connection to an organization or cause. These associates have a passion for helping those in need, and Baird Foundation strives to enhance the impact of their contributions. Priority is given to organizations where Baird associates are actively involved in volunteer or leadership roles.

In addition, Baird associates are encouraged to support their favorite nonprofit organizations and causes through personal volunteering commitments, Baird's Charitable Gift Matching Program and the Baird Cares program, which enables associates to take one paid day off each year to volunteer in their communities.

# \$313,643

**IN 2012, BAIRD FOUNDATION  
MATCHING CONTRIBUTIONS  
TOTALLED MORE THAN \$313,000.**



*\*Includes ethnic, religious, environmental, professional and youth organizations.*

"I support the Foundation for Sarcoidosis Research. This cause is really important to my family, as my dad suffers from Sarcoidosis in his lungs, making it difficult for him to breathe. It means a lot to me to have Baird's support in the search for a cure."

– **Nicole Bramson**, Vice President of Investor Relations  
Baird Capital, Chicago

"I served on the board of the Chester County Food Bank during my tenure as a senior vice president with the Chester County Economic Development Council. The Chester County Food Bank serves thousands of people in need each year, right here in the county where we live and work."

– **Timothy Connor**, Public Finance Banker  
Exton, Pennsylvania

# \$2,722,684

**IN 2012, BAIRD FOUNDATION  
GAVE MORE THAN \$2.7 MILLION  
TO QUALIFIED NONPROFIT  
ORGANIZATIONS.**

"The Longboat Key Garden Club provides scholarships for young girls. Thank you for supporting our community's children!"

– **Lisa Russo**, Financial Advisor  
Sarasota, Florida

# 38%

**IN TOTAL, 38% OF BAIRD  
FOUNDATION'S GIFTS IN  
2012 SUPPORTED DIVERSITY  
INITIATIVES.**

"I am on the board of the Park Square Theatre, which serves 25,000 students each year, including low income and diverse student audiences. Baird Foundation's matching donation helped to support our mission to bring theater into their lives."

– **Karen Heintz**, Branch Manager  
Edina, Minnesota

# \$670,974

**BAIRD FOUNDATION DONATED  
MORE THAN \$670,000 TO  
EDUCATION-FOCUSED  
CHARITIES AND NONPROFIT  
ORGANIZATIONS IN 2012.**

## 2012 BAIRD FOUNDATION GIFT HIGHLIGHTS

In 2012, Baird Foundation contributed \$2,722,684 to deserving nonprofit organizations.

Baird Foundation supports 501(c)(3) nonprofit organizations across the country, making an impact in virtually all 50 states.

Although Baird Foundation does not make gifts to international-based organizations, Baird routinely contributes to organizations with global reach and also helps our overseas associates give back to their local communities. The firm also makes corporate-level contributions to deserving individuals, causes and organizations not designated as 501(c)(3) nonprofit organizations.

# 38%

**IN TOTAL, 38% OF BAIRD FOUNDATION'S GIFTS IN 2012 SUPPORTED DIVERSITY INITIATIVES.**



"I DONATED TO THE BEACON JOURNAL CHARITY FUND, WHICH PROVIDES DENTAL AND ORTHODONTIC CARE TO CHILDREN AND FAMILIES IN NEED. THE ORGANIZATION ALSO PROVIDES DENTAL HYGIENE EDUCATION CLASSES TO MORE THAN 6,000 STUDENTS IN OUR COMMUNITY!"

SHARI WHITFIELD, SENIOR INVESTMENT CONSULTANT, AKRON, OHIO



IN 2012, BAIRD FOUNDATION  
GAVE MORE THAN \$2.7 MILLION  
TO DESERVING NONPROFIT  
ORGANIZATIONS IN VIRTUALLY  
ALL 50 STATES.

**"My family actively volunteers and supports the Midwest Therapeutic Riding Program, which offers therapeutic riding and hippotherapy to children with physical, cognitive and/or emotional disabilities. My mother volunteers there every week and my wife helps set-up their events and fundraisers. Baird Foundation went above and beyond by recognizing the importance of this Wisconsin-based organization to my family, and the many families that it serves through the sponsorship of MTRP's annual Making Dreams Come True fundraiser. The Foundation's support helps MTRP give children with special needs and their families a really unique opportunity to enjoy learning and developing physically, cognitively and emotionally."**

**Patrick Galgan, Platform Specialist in Milwaukee**



**"The Lone Survivor Foundation supports wounded veterans and their families through a unique combination of outdoor and therapeutic activities. I heard its founder, Marcus Luttrell, a retired Navy SEAL and the sole survivor of Operation Redwing, share his story. I was incredibly moved – it was a life-changing moment for me. My wife and I began to follow his story and made a donation to the Foundation, which Baird Foundation matched. As our very young children grow up, we plan to pass the Baird tradition of giving back on to them, too."**

**Brandon Hall, Financial Advisor in West Bend, Wisconsin**



## Start Safe Travel



### Safety Inside the Vehicle

- Children should not be left in a car without an adult, not even for two minutes.
- Always lock car doors and the trunk.
- Keep keys and remote entry devices out of reach of children.

### Car Seat Basics

- Children should ride in a back seat until they are 13 years old.
- Children and adults should be buckled up the same way as they sit.
- Children should use car seats or booster seats that are right for their age, height, and weight.
- Always follow all of the instructions on using and installing a car seat.
- Do not use car seats from the marketplace yard sale.
- Make sure your car seat has not expired.



"I serve on the board and finance committee of Friends of the Katy Trail, a private organization that builds and maintains Dallas' Katy Trail. While the Trail is a part of the city's parks system, it is privately funded, so every bit of support is needed and welcomed – it helps us maintain the Trail's landscaping, lighting and water system for the thousands of Dallas citizens that use the trail every week. Baird Foundation's support of our organization really reflects the firm's commitment to giving back to the communities where they do business."

Jayson Bales, Financial Advisor in Dallas



"So many families struggled after Hurricane Sandy, and obtaining supplies for recovering and injured pets was yet another obstacle during a very difficult time. I supported the American Society for the Prevention of Cruelty to Animals, which mobilized to rescue and care for these animals."

Karina Vari, Investment Banking Administrative Assistant, Chicago

## MAJOR CAMPAIGNS

In addition to the wide variety of volunteer and fundraising efforts hosted by Baird offices and associates worldwide, Baird also runs two major annual giving campaigns.

### UNITED WAY CAMPAIGN

United Way strengthens communities across the United States by supporting local organizations that strive to improve education, help families become financially independent, promote healthy lifestyles and end the cycles of violence and poverty.

Baird is also a leader in United Way's Toqueville Society, which recognizes individuals who have given \$10,000 or more annually to United Way.



## GIVING PROFILE:

### 2012 UNITED WAY CAMPAIGN

# 95%

OF ASSOCIATES DONATED

# \$1,152,944

IN ASSOCIATE DONATIONS

# \$1,413,795

TOTAL UNITED WAY  
CONTRIBUTION BY BAIRD  
AND ITS ASSOCIATES

*All numbers reflect giving in Milwaukee and Chicago.  
A number of additional Baird offices run their own  
successful United Way campaigns.*

**UNITED PERFORMING ARTS  
FUND CAMPAIGN**

Southeast Wisconsin is home to a vibrant performing arts community. Many of the region's leading acts – First Stage Children's Theater, Florentine Opera, Milwaukee Ballet, Milwaukee Repertory Theater, Milwaukee Symphony Orchestra and Skylight Music Theatre, to name just a few – receive invaluable operating support from the United Performing Arts Fund, which supports 32 performing arts groups in the area.

As a longtime supporter of UPAF, Baird recognizes the performing arts' ability to bring people together and positively influence the quality of life in our communities.



**GIVING PROFILE:  
2012 UPAF CAMPAIGN**

**93%\***  
OF ASSOCIATES DONATED

**\$208,624**  
IN ASSOCIATE DONATIONS

**\$327,828**  
TOTAL UPAF CONTRIBUTION  
BY BAIRD AND ITS ASSOCIATES

*\*The UPAF campaign is run in Milwaukee.*



“THE SUPPORT OF BAIRD FOUNDATION WAS INCREDIBLE. BETWEEN THEIR DONATION AND THE DONATIONS FROM BAIRD ASSOCIATES, 100 CENTS ON EVERY DOLLAR WENT DIRECTLY TO CONSTRUCTION AND ADMINISTRATIVE COSTS AT THE METHODIST CHILDREN’S HOME.”

## SPOTLIGHT ON GIVING

Baird Foundation provides direct support to charitable organizations across the United States, with a specific focus on nonprofits where Baird associates are actively involved. Following are just a few that benefited from Baird Foundation's support in 2012.

### METHODIST CHILDREN'S HOME

Far too many children around the world grow up without a place to call "home." The Methodist Children's Home of Coronado, Costa Rica, strives to build a brighter future for the next generation by providing orphaned children with a nurturing environment, safe home and proper education.

In unique situations, communities can join together across borders to make a difference in the lives of those in need. That's exactly what Jarrett Kovics, Director of the Texas Market for Baird Private Wealth Management, did when he traveled with a group from Dallas' Highland Park United Methodist Church to the Methodist Children's Home in Costa Rica in the fall of 2011. The experience opened his eyes to the genuine need for a home for the orphans of Coronado.

"The Methodist Children's Home is a place where children who would otherwise be homeless have a place of their own to call home, to grow up in and have a family," said Jarrett. "We did a lot of the hard physical labor needed to build the Home's second house, but we also spent time

with the kids – simple things like kicking a ball around, reading and singing songs together. As a dad with three kids under the age of eight, it doesn't take much to tug on my heartstrings. I knew I had to do something more to help them finish the Home."

Jarrett's version of "something more" might surprise you. Rather than simply asking his friends and family to donate to the cause, Jarrett wanted to find a way to justify his request for their support. He Googled the "toughest race in the world" and resolved to run the Atacama Crossing, a grueling seven-day, 155-mile ultramarathon across Chile's Atacama Desert. He spent the next year training for the race.

With the help of Baird Foundation and many Baird associates who donated to his cause, Jarrett completed the Chilean trek and raised enough money to help the Methodist Children's Home build their second on-site house, which 15 Costa Rican children now call "home." Once completed, the Children's Home will have five houses and be home to more than 50 children.

"The support of Baird Foundation was incredible. Between their donation and the donations from Baird associates, 100 cents on every dollar went directly to construction and administrative costs at the Methodist Children's Home. The children now have a home where they can have a proper life and education."

## MARQUETTE UNIVERSITY URBAN SCHOLARS PROGRAM

For first-generation and economically disadvantaged students, challenges faced outside of the classroom can have a major bearing on their future educational opportunities. Marquette University's Urban Scholars Program gives these students a unique way to pursue a college education.

The Urban Scholars Program provides full-tuition scholarships to Marquette University in Milwaukee to promising students who demonstrate scholastic merit, commitment to extracurricular activities, strong leadership skills and financial need.

The scholarships are designated for students who attended Milwaukee-area high schools and Cristo Rey Network high schools or are members of the Boys & Girls Club of Greater Milwaukee or Boys & Girls Club of America. In addition, these scholastic awards are renewable for up to eight semesters of study – a tremendous opportunity for exceptional students who would otherwise be unable to afford the expense of four years of instruction at a private university.

# \$670,974

**IN 2012, BAIRD FOUNDATION  
DONATED MORE THAN  
\$670,000 TO EDUCATION-  
FOCUSED CHARITIES AND  
NONPROFIT ORGANIZATIONS.**

"The Urban Scholars Program consistently turns out talented student leaders who are poised to make a difference in their communities, both on and off campus, before and after graduation," said Mary Ellen Stanek, Chief Investment Officer for Baird Advisors and Trustee Emeritus of Marquette University's Board of Trustees. "I can't say enough about how truly impressive and inspiring the Urban Scholar students really are."

2012 marked the third year of Baird Foundation's multiyear sponsorship of the Urban Scholars Program. In addition to a monetary donation to support the

Program's scholarships, Baird also employs Marquette University students in its corporate headquarters in Milwaukee, giving students the chance to supplement their classroom education with hands-on job experience.

Karina Moreno, Risk Management Financial Analyst, participated in the Urban Scholars Program when she was a student at Marquette University. "After I graduated from high school, I approached Paul Purcell, Baird's CEO, about getting an internship in Baird's Milwaukee office," said Karina. Her bold question paid off. Karina interned at Baird for all four years of her college education, working in the Finance, Equity Research and Public Finance departments. "Baird helped me pursue my education and hands-on professional experience. Not only did

my internship give me the chance to explore different areas of my field of interest, it helped me navigate the rigors of my college coursework and ultimately select the right career for me." After graduation, Karina accepted an offer to join Baird as a full-time associate and currently works in the firm's Risk Management department.

"Baird and Baird Foundation are deeply committed to promoting diversity, inclusion and high-quality education in our communities, and our partnership with the Marquette University Urban Scholars Program goes hand-in-hand with those values," noted Mary Ellen. "The Urban Scholars Program helps make higher education a reality for students who grew up in urban areas, but perhaps never thought college would be a part of their future."

**"BAIRD HELPED ME PURSUE MY EDUCATION AND HANDS-ON PROFESSIONAL EXPERIENCE. NOT ONLY DID MY INTERNSHIP GIVE ME THE CHANCE TO EXPLORE DIFFERENT AREAS OF MY FIELD OF INTEREST, IT HELPED ME NAVIGATE THE RIGORS OF MY COLLEGE COURSEWORK AND ULTIMATELY SELECT THE RIGHT CAREER FOR ME."**



## FEEDING CHILDREN EVERYWHERE

In 2012, more than 870 million people across the globe suffered from chronic undernourishment. The Hirsch Group of Baird's Tampa Bay, Fla., office partners with one of Baird's longtime clients, Kforce, to support Feeding Children Everywhere, an organization with a unique and collaborative approach to fighting world hunger.

Feeding Children Everywhere brings individual volunteers, companies, schools and community organizations together to assemble nutritious meals for hungry people around the world. Their recipe is simple – just rice, lentils, a blend of dehydrated vegetables and salt – but it requires quite a bit of teamwork to come together.

For the second straight year, The Hirsch Group joined more than 900 Kforce associates and

“IT’S VERY HUMBLING TO BE A PART OF AN ORGANIZATION THAT’S COMMITTED TO AND GENEROUS IN SUPPORTING THE CAUSES THAT ITS ASSOCIATES BELIEVE IN.”





other volunteers for a high-energy meal packing event at Kforce's Tampa Bay headquarters. The event was incredibly prolific – in just eight hours, volunteers packed more than 250,000 meals to ship to families in Tanzania.

"It was a really hands-on, 'feel good' event," said Andy Hirsch, Baird Senior Investment Consultant, who volunteered at the event with his Baird colleagues and his daughter. "We worked together at long tables with scales, bagging machines and the meal ingredients to assemble as many meals as we could in 30 minute shifts. Everyone was incredibly enthusiastic and ready to work."


In addition to a charitable gift to Feeding Children Everywhere from Baird Foundation and a matching gift from The Hirsch Group,

associates from several of Baird's businesses also stepped up to support Kforce's dedication to community and donate to the cause.

"Kforce shares Baird's commitment to giving back, and we wanted them to know that our entire firm was behind their support of Feeding Children Everywhere as well as the greater cause itself," said Andy, who reached out to senior leadership in Baird's Investment Banking and Equity Capital Markets businesses for their support.

"The comprehensive backing of Baird, our fellow associates and Baird Foundation was incredible. It's very humbling to be a part of an organization that's committed to and generous in supporting the causes that its associates believe in."



A black and white photograph of two women standing on a wooden deck under construction. They are both wearing purple t-shirts. The woman on the right has a name tag that says "BAIRD". They are both smiling. In the background, there are wooden framing, a white pickup truck, and some houses. A purple semi-transparent banner is overlaid on the image, containing white text.

FOR MORE INFORMATION ON BAIRD  
FOUNDATION, PLEASE CONTACT JIM BELL  
AT [JBELL@RWBAIRD.COM](mailto:JBELL@RWBAIRD.COM) OR 414-765-3780,  
MARGARET WELCH AT [MMWELCH@RWBAIRD.COM](mailto:MMWELCH@RWBAIRD.COM)  
OR 414-298-6197, OR VISIT [RWBAIRD.COM](http://RWBAIRD.COM).



©2013 Robert W. Baird & Co. Incorporated. Member SIPC.  
Robert W. Baird & Co., 777 East Wisconsin Avenue, Milwaukee, WI 53202  
800-RW-BAIRD. [rwbaird.com](http://rwbaird.com)  
MC-37547. #1437.12