



EXTENDING
our REACH

2014 Baird Foundation Annual Report



“...BUILDING
RELATIONSHIPS IN
THE COMMUNITY AND
EMPOWERING ASSOCIATES
TO GET INVOLVED IS
CENTRAL TO OUR
CULTURE.”

A MESSAGE FROM PAUL PURCELL AND STEVE BOOTH

2014 was a year of growth for Baird, with expansion into new markets, increased presence in existing markets and the introduction of new capabilities. A notable highlight was our merger with McAdams Wright Ragen, which added to our talent and presence in the Pacific Northwest. Our continued expansion not only deepens our ability to serve our clients' needs, it also enables the firm to extend our reach into new communities where we live and work.

We believe that one helping hand can ignite significant and positive change. Whether associates are volunteering their time and talent, donating generously, or influencing others to get involved in the community – their impact is felt and can be far-reaching. Our ongoing commitment to building relationships in the community and empowering associates to get involved is central to our culture. We provide opportunities for associates to support organizations that are important to them through numerous efforts, including:

- **Baird Gives Back Week:** An opportunity for associates to volunteer

with colleagues and family members at nonprofit organizations during regular work hours.

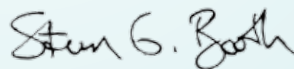
- **Baird Cares:** Baird associates receive paid time off and flexibility in their schedules to accommodate volunteer work.
- **Baird Foundation Matching Gift Program:** A program that matches associates' personal donations to one or more nonprofit organizations of their choice.

Thank you for your part in extending our reach and making a meaningful difference.

All our best,



Paul E. Purcell
Chairman & Chief Executive Officer



Steve G. Booth
President & Chief Operating Officer



About Baird Foundation

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.

Our Commitment to Giving Back

Most Baird Foundation grants are given in support of requests by Baird associates who have a special connection to an organization or cause. These associates generously give time and/or financial support, and the Foundation helps enhance their contributions.

Governance

Baird Foundation is overseen by a board of directors and includes representation from across the firm.

Global Reach

In 2014, Baird Foundation made an impact in almost all 50 states. While the Foundation doesn't make contributions to organizations outside of the U.S., Baird regularly contributes to organizations with global reach and also encourages our overseas associates to give back to their local communities.



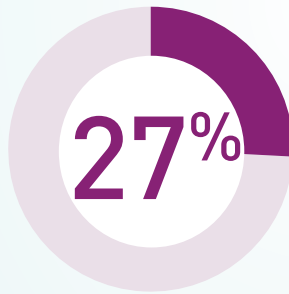
2014 HIGHLIGHTS: BAIRD FOUNDATION

\$3.1 million contributed to qualified nonprofit organizations

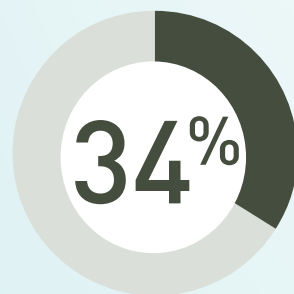
GIVING BY AREA OF FOCUS



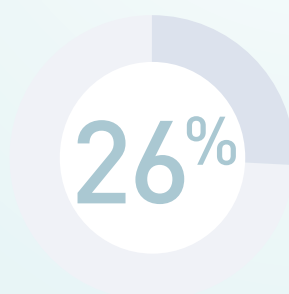
Arts



Education



Health and
Human Services



Other*



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

BAIRD FOUNDATION MATCHING GIFT PROGRAM



Kelly Bittner
Financial Associate

#YWCA is important to me because we need to support women from all walks of life, from education and leadership, to family support and personal safety.

YWCA Seattle · Seattle, WA



Jessica Boland
Senior Client Specialist

Every animal is worthy of a Forever Home! **#OHS** is an amazing, life-changing society with a 98% save rate, taking in animals from over 70 animal welfare agencies!

Oregon Humane Society · Portland, OR



Jayson Noland
Senior Research Analyst

We are passionate about education and love the Baird matching gift for **#KentfieldElementarySchools!**

Kentfield Schools Foundation · Kentfield, CA



Virginia Sunu-Davis
Art Director

So thankful! Baird's gift match allowed my 7-year-old **#CompassionInternational** child, Francis, to stay in school for 6.5 more months in Tanzania, Africa!

Compassion International · Colorado Springs, CO



John and Janet Mockovciak
Senior Investment Consultant, along with wife
Co-founder of Dallas Afterschool Network

We believe all children should have the same opportunities to explore their passions everyday afterschool no matter what zip code they are born into.

Dallas Afterschool Network · Dallas, TX



Baird Foundation
matched associates'
gifts to organizations in
44 states

In addition to gifts made directly to qualifying charities, Baird Foundation matches U.S. associates' contributions to 501(c)(3) nonprofit organizations up to 50% through Baird Foundation's Matching Gift Program.

Baird also funds a Matching Gift Program for associates in Europe and Asia.

In 2014, Baird Foundation match contributions totaled more than \$435,000.



John Neis
Partner

The way the Foundation supports my charitable efforts truly signifies that Baird cares about the communities & organizations that are important to its associates!

Catherine Cook School · Chicago, IL



Yolanda Carmona
Senior Vice President, Operations

My father suffered with Parkinson's disease. I am compelled to support the [#MichaelJFoxFoundation](#) in order to find a cure. Baird's gift match is an added bonus.

Michael J Fox Foundation · New York, NY



Sarah Langlas
Senior Financial Analyst

[#UniversityOfIowaFoundation](#) reduced my financial stress so I could focus on my education & career goals. I want to do the same for current Iowa students.

University of Iowa Foundation · Iowa City, IA



Mark Cimperman
Fixed Income High Yield Sales

I donate because of the impressive character of the marines I've had the pleasure of meeting, and the sacrifice they continue to make for this country. Oorah!

Marine Corps Scholarship Foundation · Alexandria, VA



Jay Sangervasi
Institutional Fixed Income Sales Manager

I continue to give because the leadership opportunities, values & friendships a [#HarpethHall](#) education gave my daughters are priceless gifts.

Harpeth Hall School · Nashville, TN



Paul Buskey
Managing Director

[#BigCatHabitat](#) cares for beautiful, hungry, abandoned animals. Without Baird's help, they wouldn't be able to protect and nurture wildlife.

Big Cat Habitat Gulf Coast Sanctuary · Sarasota, FL



ASSOCIATE INVOLVEMENT

Baird encourages associates to get involved with organizations they're passionate about, and dedicates time and resources to support their efforts. One of the most significant ways we do this is through Associate Resource Groups (ARGs). What makes these groups special is that they're created and led by associates from across the firm, and there are more than 1,000 active members worldwide. The ARGs bring associates together for dialogue

around specific interests, and focus on professional development, networking and leadership events.

There are five organizations: Baird Gives Back, ECO (Environmental Conservation Opportunities), PRISM (multicultural), Spectrum (LGBTQA) and Women ARG. Each group embodies a culture of improving our communities, sponsoring fundraising events and promoting volunteer opportunities.

SPOTLIGHT ON BAIRD GIVES BACK WEEK

Baird Gives Back Week is an opportunity for associates to volunteer with colleagues and family members at nonprofit organizations during regular working hours.

1,500
associate and family
member participation

60
Baird locations

4,000 volunteer hours donated to nearly **100** nonprofit organizations

REPRESENTATIVE ASSOCIATE RESOURCE GROUP COMMUNITY ACTIVITIES



ECO

ECO hosts an annual Earth Day celebration where associates team up to clean up, and share ways to improve environmentally sustainable practices at work, at home and in our communities.



PRISM

Each year PRISM organizes a team to participate in the United Negro College Fund (UNCF) annual walk/run.



BAIRD GIVES BACK

Throughout the year, members of the group share volunteer and charitable activities with Baird associates to inform them on ways they can get further involved in their community.



SPECTRUM

Baird Foundation partnered with Spectrum to sponsor and plan the "It Gets Better Project" event to shed more light on the worldwide anti-bullying initiative for LGBT youth.



WOMEN

Women at Baird is a biennial event with approximately 400 attendees that strengthens and grows mentor relationships, and presents topics pertaining to women and leadership.



UNITED WAY

United Way supports a variety of local organizations across the U.S. that work hard to strengthen families, improve education, help individuals become self-sufficient, and put an end to violence and poverty.

Along with high participation, Baird is also a leader in the Tocqueville category, which represents individuals who have given \$10,000 or more annually to United Way.

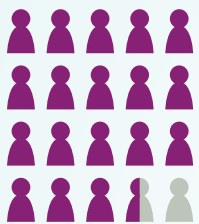
Paul Purcell, Baird Chairman & Chief Executive Officer, served as a co-chair for the 2014 United Way of Greater Milwaukee campaign.



OVER **95%**
of associates
donated*

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

\$1.6 million total United Way contribution by Baird and its associates



92%
of associates
donated*

**The UPAF campaign is run in Milwaukee.*

\$460,000 total UPAF contribution by Baird and its associates

UNITED PERFORMING ARTS FUND (UPAF)

Wisconsin is home to a vibrant and diverse performing arts community. Many of the region's leading performing arts groups, including – Milwaukee Ballet, Milwaukee Repertory Theater, Milwaukee Symphony Orchestra, Florentine Opera, First Stage Children's Theater and Skylight Music Theater – receive funding from UPAF to keep their programs flourishing.

As a longtime supporter, Baird recognizes the arts' ability to enhance quality of life and economic vitality in the Milwaukee area.



Baird's Vice Chairman, Glen Hackmann, served as co-chair for the 2014 UPAF campaign. Photos courtesy of UPAF.

SPOTLIGHT ON GIVING

Mechanics' Institute

Patience and fortitude are key characteristics that the game of chess demands. And when applied beyond the board and in the classroom, some say magic can happen.

Vince McCambridge, Director in Fixed Income Institutional Sales in Baird's San Francisco office, knows a thing or two about chess. He took up the game at age 12 and became a chess master by 16. In college, he was introduced to the Mechanics' Institute, home to the nation's oldest operating chess room, and now sits on the board of trustees for the organization.

In March, Baird partnered with the Mechanics' Institute to host San Francisco's first-ever scholastic chess

championship at the Hall of Flowers in Golden Gate Park. The event drew more than 275 Bay Area kids from a variety of social and economic backgrounds, ranging from beginners to advanced players.

Vince said, "The tournament is an excellent way to not only promote the game, but also support education in the community – causes to which Baird is very committed. Chess teaches kids to be analytical thinkers and motivated learners, to develop problem-solving skills. It teaches them to think before they act and helps them gain self-esteem and improve their overall scholastic performance. Ultimately, we couldn't have done it without Baird's help."



Midwest Athletes Against Childhood Cancer

For the last six years, Green Bay Packers quarterback Aaron Rodgers has been helping kids with cancer and blood disorders by teaming up with the MACC Fund (Midwest Athletes Against Childhood Cancer). The MACC Fund's mission is to bring support and financial backing to research in order to find a cure. The organization has had significant impact – contributing more than \$52 million in donations to date, and helping increase the five-year survival rate of childhood cancer to 80%.

Each year Baird recognizes a Wisconsin athlete with the “Baird Community Involved Player of the Year” award, which highlights a leader within the community who has shown tremendous commitment and dedication to making

a difference. “This year was an easy decision for us to honor Aaron Rodgers,” said Steve Booth, Baird President & Chief Operating Officer. “He sets a terrific example of giving back that inspires others to do the same. His close involvement with the MACC Fund, along with other charitable causes and events, further supports our selection.”

In addition to the award, Baird Foundation donated \$5,000 in Rodgers' name to the MACC Fund.



Survivor Spotlight

Brandon Novack, now 25, is an inspiration to many and a great example of the impact one individual can have when extending his reach in the community and helping others overcome adversity. As a survivor of childhood cancer, Brandon now volunteers his time and talent to the organization that made such a positive impact in his life.

“I’ve had the unique honor of being able to share my story at various events, birthday parties, charity dinners, you name it,” said Brandon. “Every time I do, it’s amazing to see the outpouring of support from people whom I’ve never

met before but who want to help. To know there’s always someone there to support you and who has your back, that’s a powerful thing. And that’s also why I consider those people—volunteers, donors, doctors, researchers—my extended family.”



HOLIDAY GIFT

Each year Baird makes a holiday gift donation on behalf of associates and their loved ones to select charitable organizations.

Make-A-Wish

You never know when inspiration might find you. John Ramseyer, Baird Branch Manager in Seattle WA, boarded a plane to Los Angeles 25 years ago that changed his life forever.

“The family across the aisle from me was talking about Disney Land and I couldn’t help but smile at their excitement,” said John. “I noticed they were all wearing Make-A-Wish t-shirts and overheard that one of the young

boys had cancer. Those words struck me hard, and from that moment I knew I wanted to get involved.”

The moment resonated with John and one day he read in the local newspaper that the Make-A-Wish Seattle Chapter was hosting its annual gala. He and his wife immediately signed-up.

“I felt those same feelings and emotions I had on that flight, and I knew I couldn’t let the moment

pass me by. Now, my wife and I attend the gala every year and sponsor a table. We intentionally invite different people each year so we can share in the experience and get others interested and involved.”

John is currently an active participant on the Board of Trustees for the Make-A-Wish Alaska and Washington Chapter. “My involvement is very simple,” he concluded, “It’s something I really care about.”

Wounded Warrior Project

The Wounded Warrior Project (WWP) provides a variety of programs and services to assist military men and women who have sustained a physical or mental injury, illness or wound. The organization also offers an alumni program where warriors band together and attend special receptions, dinners, sporting events, and more.

Jim Hodges, Branch Manager in Baird’s Baltimore office, expressed why he feels strongly about

donating to the organization, saying, “I feel that as Americans, it’s our duty and responsibility to support the brave men and women who have put their lives on the line each and every day. Donating is my small way of helping.”

“About five years ago, a friend of mine asked if I wanted to go on a hunting trip with a few members of WWP,” said David Adams, Baird Senior Client Specialist in the Maryland office and longtime volunteer for WWP. “It was a great experience and I had such admiration for what they had

endured and the hurdles they had overcome. I immediately wanted to do more to get involved and be able to give back to the men and women who had given up so much for me and my country.”

“If I can put a smile on their face, even for a brief moment,” said David, “that means everything to me.”

Chicago Zoological Society

Each year, the Chicago Zoological Society (CZS) Women's Board and the Board of Trustees host a large fundraiser at the Brookfield Zoo and give guests the opportunity to get up close and personal with some of the zoo's most exotic animals. This year, over 600 people attended the CZS gala and the event raised \$1.5 million toward conservation, education and welfare programs in support of wildlife.

Rosa Ebling, Baird Financial Advisor in the Chicago office, has been a member of the CZS Women's Board for five years and was asked to chair this year's event.

"When they approached me about the gala, I was both excited and nervous," Rosa said. "It's a wonderful event, but it's also a lot of hard work. We felt very fortunate to have such a great turnout."

"The zoo lets people experience wonderful creatures that they may never have the opportunity to see in the wild, and it teaches us conservation. The Brookfield Zoo has species that are endangered and we do everything we can to educate children and adults on what they can do to help."



Photos courtesy of the Chicago Zoological Society

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