Baird Online – Sharing Account Access

To proceed with account sharing, the person you are sharing with must have a registered Baird Online User ID. If they do not, you will need to print and complete the Baird Online Viewing Agreement.

1. Click on Account Services, select Account Access, and click the Share Account Viewing button.

2. Enter the e-mail address associated with the account you would like to share your accounts with.

If the e-mail address you are looking to share account access with does not have a Baird Online User ID, you will receive the following error.

Please contact your Financial Advisor or the Baird Online Help Desk at 1-888-212-8843 for assistance.
3. Select the accounts to share by checking the **Grant Account Access** check box. Review the Terms & Conditions, and click **Next**.

   **Note:** You can only share the accounts of those which you have ownership associated with.

4. Verify the selections of the accounts you would like to share. Click **Send E-mail** to complete the process.

5. The final step is confirmation the email was sent to the intended recipient. You will receive a confirmation e-mail once the recipient accepts your invitation to share your accounts online.

If you have questions or need more information, please contact: Baird Online Help Desk 1-888-212-8843 or e-mail at: bairdonline@rwbaird.com