

The BAIRD logo is a dark blue parallelogram tilted to the right, containing the word "BAIRD" in white, uppercase, serif font.

The Baird Way

Discover the Baird Difference



Teamwork

Clients come first

Employee-owned

Community involvement

Trust

Expertise

Authentic

Respect

Partnership

Diverse

Collaboration

Integrity is Irreplaceable

Everyone matters



A Different Kind of Financial Partner

There are many ways Baird is different from other financial firms. Being privately held frees us to focus on our mission – to provide the best financial advice and service to our clients and be the best place to work for our associates – not the short-term expectations of outside shareholders. Being employee owned gives all of us a personal stake in our clients' success. But perhaps most important is the culture that's guided us since our founding in 1919. It started with a simple idea – putting clients' first. But the more we came to know and care about those clients and the things that mattered most to them, the more we understood our business was about trust, partnership, shared values and better futures. What we call the Baird Way represents not only the responsibility that comes with that understanding, but the pride of knowing it brings out our best in everything we do – for our clients, for each other and in the communities we share.

"Honesty in our business dealings
integrity in everything we do"

2023



Steve Booth
President & Chief Executive Officer

For more than a century Baird has guided families and institutions toward better financial futures, helping companies grow in markets around the world and individuals achieve their potential as our associates. Our business success has always depended on the strength of our relationships, which are built on trust.

Like all of Baird's employee-owners, we take that trust very seriously. Our commitment to earning and keeping it is ingrained in the culture we've created together from a common set of ideas.

A handwritten signature in black ink that reads "Steve G. Booth". The signature is written in a cursive, slightly slanted style.

Clients come first

Integrity is
irreplaceable

Quality is our
measure of success

The best financial
advice is the result
of expertise and
teamwork

How we succeed
is as important as
if we succeed

We seek personal
balance in home,
work and community
involvement



TOYEMENT

GLOBAL RESOURCE

GLOBAL COLLABORATION

PATIENTS COME FIRST - CH

*The clearest sign of our clients' trust is the assets we manage and oversee for them.
And we're committed to earning that trust every day.*

.....
Mary Ellen Stanek, President of Baird Funds



Clients Come First

The financial services industry began as a means for people to improve their lives by participating in the growth of the companies, communities and institutions that underpin society. That idea is still at the core of all we do. Even as the financial world grows more complex, we still make every decision based on what's best for our clients.

Being employee-owned makes that easier. We can take a longer view when planning for and investing in our businesses and do that with our clients' needs squarely in mind. That's why we've continued to grow and expand into areas where clients want our expertise and we know we can serve them well. There are certain types of business we don't do – even though they might be good for our bottom line – because we don't see a value or benefit for clients. Those are decisions we stand by.



An a__hole is anyone who puts themselves before the client or before the firm.

.....
Former President, CEO & Chairman



Integrity Is Irreplaceable

Our founder, Robert Baird, knew the importance of our clients' trust when he called for: "Honesty in our business dealings and integrity in everything we do."

Today these ideas are reinforced by our firm's well-documented "No A__hole Rule," which calls for everyone to put clients and the firm ahead of themselves.

What this colorfully concise phrase means to us is that we strive to be good ambassadors of Baird's brand and culture through our commitment to excellence for clients, respect for our fellow associates' perspectives, backgrounds and beliefs, and genuine desire to make a difference in the communities we all share.



"Be a yardstick of quality."

*Every day you should ask yourself "Did I do my best for my clients today?"
If you do that, and you can honestly answer yes, then the rest should really take care of itself.*

.....
Beth Kavelaris, Director of Culture and Integration



Quality Is Our Measure of Success

In financial services, it's easy to focus on numbers. But we know what's really at stake – people's futures and quality of life. Some clients may be thinking about their families or their communities. Others may be thinking about their investors, customers or the people who work for them. But they're all focused on the best possible outcomes for those people.

Those clients won't measure our success just by a number on a statement or a report, but also by the confidence and peace of mind they gain from working with us and the outcomes we create together.

*We are in the business of making decisions and helping our clients make decisions.
The more diversity you have around the table when evaluating those decisions,
the better those decisions will be.*

.....
Gordon Pan, President of Baird Capital

The Best Financial Advice Is the Result of Expertise and Teamwork

An advantage of being employee-owned is our collaborative environment. All of us at Baird are stakeholders with a shared, personal interest in the quality of the outcomes we strive to create for clients and a valued voice in determining the best ways to do that.

A common focus unites us and helps us appreciate the diversity in our backgrounds, perspectives and areas of expertise. We understand our knowledge and skills complement each other, and more eyes and minds working on what matters to our clients yield the best ideas and outcomes.



*Everyone shows up because they want to be here.
We could choose to be somewhere else, so I know in my core that people work here
because they care and want to deliver the very best for our clients.*

.....
Rodney Jones-Tyson, Chief Risk Officer

How We Succeed Is as Important as If We Succeed

Success results from a journey we take together, and it's important that we get there in a way that's right for all of us.

This is why our mission has two parts. The first is to provide the best advice for our clients. We don't apply one-size-fits-all solutions. We get to know the client, their situation, needs and preferences before we offer advice.

The second part of our mission is to be the best place to work for our associates. By design, we all have a voice in the way we do our business and a shared interest in the successes we create together. Because talented people who feel good about what they do, where they do it and who they work with are far more likely to do their best.





*We find that most of our people got into this business because they care.
We appreciate that, and we know it's not something that stops at the end of the workday.*

.....
Laura Thurow, Executive Director of Wealth Solutions and Operations

We Seek Personal Balance In Home, Work and Community

Part of being a great workplace is making sure our associates live full, balanced lives. We know that when our people and our communities thrive, our business thrives, and we know our associates are passionate about all three.

We have flexible work arrangements to make available more time for family or personal reasons. We support those who share our passion for giving back by matching charitable contributions and providing paid days off to volunteer. We have robust Associate Resource Groups around a wide range of interests that enable our associates to pursue common passions, develop leadership skills and grow their personal networks.





BAIRD

*"Honesty in our business dealings
and integrity in everything we do."*

Robert Wilson Baird