Baird Trust Online – Powered by WealthAccess
Getting Started Guide

Quick Start Guide

1. You will receive an email inviting you to join Baird Trust Online.
2. Click the **Setup Your Account** button. Your email is your username.
3. Follow the prompts to establish a password, security questions, and your account preferences.

Highlights

- See everything in one place. Add your credit cards, bank accounts, real estate, mortgage, and more in a comprehensive view so you can get a complete financial picture.
- All account activity is available daily.
- You control access to your information.
- You can share with multiple advisors, leading to informed conversations and true collaboration.
- Our secure document vault makes it safe and easy to store important documents and offer them to those who need access.

Questions?

Account specific questions should be directed to your Baird Relationship Team.

For help with getting your account setup or to troubleshoot login issues, contact either your Baird Trust Relationship Manager or Wealth Access Support, who can be reached at 866.599.8889 or by accessing the Help button and submitting a request.

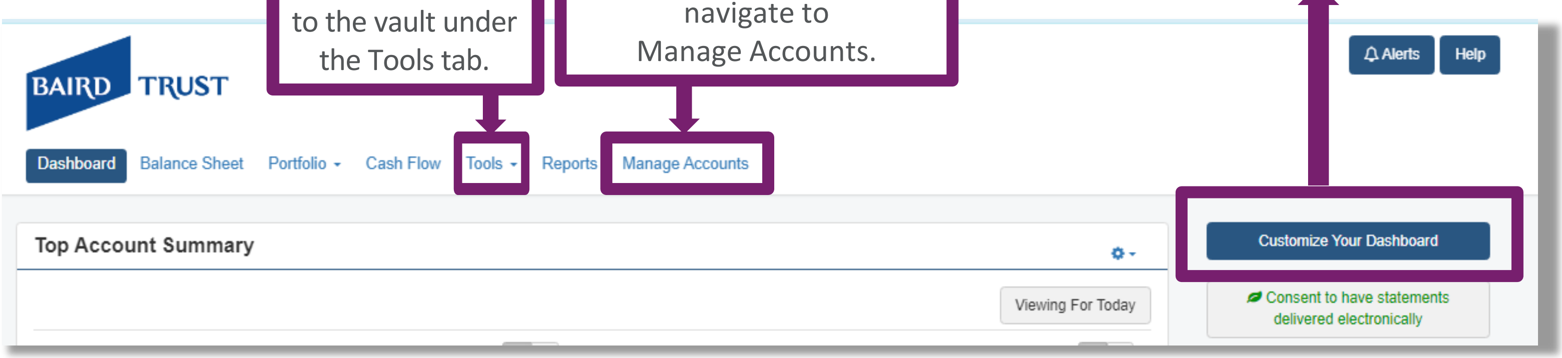
Baird Trust
Louisville, Kentucky (headquarters)
500 W. Jefferson Street, Suite 2600
Louisville, Kentucky 40202
502-588-1801 | 888-878-7845
BairdTrust-Info@rwbaird.com

Other Office Locations:
Evansville, Indiana
Cincinnati , Ohio
Nashville, Tennessee
Greenville, South Carolina

Your Dashboard is customizable. You can add/remove/reorder information widgets under Dashboard > Customize Your Dashboard.

You can view/upload documents to the vault under the Tools tab.

To view the Baird Trust accounts loaded for you, navigate to Manage Accounts.



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