

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

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.

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

The screenshot shows the Baird Trust Online dashboard interface. At the top left is the Baird Trust logo. Below it is a navigation menu with items: Dashboard, Balance Sheet, Portfolio, Cash Flow, Tools, Reports, and Manage Accounts. The 'Tools' and 'Manage Accounts' items are highlighted with purple boxes. Below the navigation menu is a 'Top Account Summary' section. On the right side of the dashboard, there are 'Alerts' and 'Help' buttons. A 'Customize Your Dashboard' button is also highlighted with a purple box. A green banner at the bottom right of the dashboard reads 'Consent to have statements delivered electronically'. Three purple callout boxes with arrows point to the 'Tools' tab, the 'Manage Accounts' tab, and the 'Customize Your Dashboard' button, providing instructions on how to use these features.