



BAIRD

# Why Baird?

What Every Client, Prospect and  
Recruit Should Know

Private Wealth Management  
Asset Management  
Investment Banking/Capital Markets  
Private Equity

## What is Baird?

Founded in 1919, Baird is one of the largest employee-owned financial services firms in the United States.

With over 5,300 associates and more than 200 locations around the world, we provide Private Wealth Management, Asset Management, Investment Banking, Capital Markets and Private Equity services to clients including individuals, communities, corporations and institutions.

# What Makes Baird Different?

## 1 Independence Drives Unwavering Focus

Being privately held and employee-owned ensures an unwavering focus on what is best for our clients and our associates.

- Without unnecessary distractions or pressure from outside shareholders, we are free to think, plan and invest for the long term
- As owners we can prioritize reinvestment in the people, expertise and technology we need to serve clients' evolving needs
- We are one of the largest truly employee-owned financial services firms in the U.S with approximately 85% of our associates at all levels of the firm as shareholders with a shared personal stake in our clients' long-term success

## 2 Exceptional People Bound by Shared Values

Our independence enables us to preserve and strengthen our client-focused culture.

- Consistent recognition as a great workplace – including being among the *Fortune* 100 Best Companies to Work For® since 2004 – helps us attract and retain the most talented people in our industry, prioritizing candidates who are a strong fit for our unique culture
- We are universally committed to The Baird Way, our core beliefs and shared cultural values including honesty, integrity, transparency, teamwork and keeping clients' interest first
- Baird has one of the lowest turnover rates in our industry. Many of our associates stay their entire careers, ensuring continuity and consistency for our client relationships

## 3

## Deep Expertise Enhanced by Extraordinary Teamwork

Our uniquely collaborative culture fosters extraordinary teamwork, including shared insights, ideas and resources around the world to serve our clients. Baird has earned national and industry recognitions for the quality of our advice and expertise including:

- 16 Senior Equity Research Analysts among the top 5% in TipRanks annual listing of all analysts on Wall Street with an additional six Baird analysts ranked among the top 10%<sup>1</sup>
- Repeated, consecutive rankings as the No. 1 municipal bond underwriter in the U.S. since 2009<sup>2</sup>
- The Baird Funds offer proven track records and four funds have received a Gold Morningstar Medalist Rating™<sup>3</sup>

Analyst Driven: 100%

Data Driven: 100%

Aggregate Bond Fund (2/5/2025)

Core Plus Bond Fund (2/4/2025)

Short-Term Bond Fund (2/5/2025)

Ultra Short Bond Fund (2/5/2025)



## 4

## Financial Strength and Long-Term Stability

Since 1919, our stability, consistency and financial strength have served our clients, our associates and our firm well. This means we can be there for those who rely on us, regardless of the market environment, offering the advice they want where and when they need it most.

- Consistently profitable for over 40 consecutive years
- More than \$3.5 billion in annual revenues and nearly \$500 billion in assets entrusted to us by our clients
- Diversified revenues from our five complementary businesses enable us to weather cyclical downturns and consistently reinvest in our capabilities for clients
- Conservative firm management with low debt ratios, excess regulatory capital and significant insurance for client assets





Discover more of what makes Baird different  
in all the right ways for you at  
**[rwbaird.com/bairddifference](http://rwbaird.com/bairddifference)**

Discover the *Baird Difference*



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<sup>1</sup> As of January 7, 2025. TipRanks tracks and measures over 9,200 financial experts, ranking the analysts based on their average returns and success rate for each buy or sell rating over the following 12 months as well as the number of ratings issued by each analyst.

<sup>2</sup> Source: S&P Global Market Intelligence Muni Deal Query as of December 31, 2024. Ranking based on number of issues. Does not include private placements or notes.

<sup>3</sup> Morningstar Gold Medalist Ratings as of February 5, 2025. The Baird Ultra Short Bond Fund (Institutional Class) received a Gold Morningstar Medalist Rating.™ The Fund's Investor Share Class received a Gold Morningstar Medalist Rating.™

The Baird Short-Term Bond Fund (Institutional Class) received a Gold Morningstar Medalist Rating.™ The Fund's Investor Share Class received a Gold Morningstar Medalist Rating.™

The Baird Aggregate Bond (Institutional Class) received a Gold Morningstar Medalist Rating.™ The Fund's Investor Share Class received a Gold Morningstar Medalist Rating.™

The Baird Core Plus Bond (Institutional Class) received a Gold Morningstar Medalist Rating.™ The Fund's Investor Share Class received a Gold Morningstar Medalist Rating.™

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