

Safeguard Your Baird Account With a Trusted Contact

By designating a Trusted Contact, you're adding an extra layer of security to your account and helping us keep you safe.

There may be times when your Baird Financial Advisor needs to reach you but is unable to do so. With a Trusted Contact, you are authorizing someone you personally trust to provide information that helps Baird connect with you.

Why should I designate a Trusted Contact?

In an emergency, a Trusted Contact can help us get in touch with you if you're otherwise unavailable, such as when you're traveling, if you've been impacted by a natural disaster or if we are concerned about potential fraud in your account. We would only contact your Trusted Contact in limited circumstances where we cannot reach you directly. Ideally, a Trusted Contact will be someone outside of your household and not already associated with your account. For example, someone you've appointed as Power of Attorney is not an ideal Trusted Contact if they are already associated with an account.

What would you ask my Trusted Contact to do?

We might ask them to confirm your current contact information, health status or location, or the identity of your legal guardians or representatives. Note that designating a Trusted Contact does not give them any authority to execute any transactions or make any decisions regarding your account, and Baird will not share information regarding your account balances or investments with Trusted Contacts.

Who should I choose as my Trusted Contact?

A Trusted Contact could be a family member, friend or other third party over the age of 18 who you can rely on to manage this responsibility. You can add, remove, or change your Trusted Contact at any time. We recommend you notify your designated Trusted Contact as soon as possible and update us if their information changes.

Establishing a Trusted Contact is completely free and only takes a few minutes. Reach out to your Baird Financial Advisor today to get started.

Discover the

Baird Difference