



Founded in 1919, Baird is an international financial services firm with more than \$415 billion in client assets<sup>1</sup>. We provide Private Wealth Management, Trust, Asset Management, Investment Banking, Capital Markets and Private Equity services to clients through our offices in the United States, Europe and Asia. As employee-owners, we manage for the long term, continuously building capabilities to best serve clients. And we conservatively manage our balance sheet and capital position to maintain financial flexibility in all types of market conditions.

Much has changed since our founding, but we know our business is still fundamentally about trust, partnership and building better futures for our clients and in the communities we share. What we call The Baird Way represents the responsibility that comes with this understanding. It is the foundation of core beliefs we share, the promise we make to each other and our inspiration to provide the best advice and service for our clients while being the best place to work for our associates.

\$415 billion

**Assets in Client Accounts**

Baird’s clients trust us with more than \$415 billion in assets as of December 31, 2021.

100 Best ×19

**A Great Place to Work**

For 19 years in a row, Baird has been recognized as one of the *Fortune* 100 Best Companies to Work For<sup>®</sup>. In 2022, Baird achieved a perfect 100% on the Human Rights Campaign Foundation’s Corporate Equality Index for the sixth consecutive year.

4,700 employees

**Global Perspective**

Baird has approximately 4,700 employees and over 200 locations in the United States, Europe and Asia.

No. 1

**Commitment to Excellence**

In 2021, Baird ranked No.1 for overall quality in sales, corporate access and research.<sup>3</sup> Since 2009, Baird has ranked as the No.1 municipal bond underwriter nationwide.<sup>4</sup>

**History**

Founded in 1919, headquartered in Milwaukee, Wisconsin.

**Member NYSE**

Robert W. Baird & Co. has been a member of the New York Stock Exchange since 1948.

**Ownership**

Baird is employee-owned, privately held and independent. More than two-thirds of our employees own Baird stock.

**Revenues**

2021 revenues were \$3.41 billion,<sup>2</sup> a firm record.

**Baird Foundation**

Baird Foundation gave \$5.4 million to qualified nonprofits in 2021.

**Senior Executive**

Steven G. Booth, Chairman, President & Chief Executive Officer

# A Century of Growth & Success

For more than 100 years, Baird's capabilities have grown with our clients' needs. Our five complementary businesses help diversify and balance revenue through all types of market conditions. Our structure and independence give us the financial strength to make ongoing investments in the professional expertise and distinctive culture that make Baird a trusted partner for individuals, municipalities, corporations and institutions around the world.



## Private Wealth Management

Baird Private Wealth Management  
Baird Trust

Baird's Wealth Management professionals provide tailored solutions to address the unique needs of high-net-worth individuals and their families.

- 1,300 Financial Advisors averaging 20 years of industry experience and serving clients coast-to-coast
- 130+ specialized experts providing advice on all aspects of wealth management – complex portfolio strategies, financial, tax and estate planning, liquidity, insurance solutions, charitable giving and more
- Access to exclusive, industry leading macro and investment research for cutting-edge information that helps inform client portfolios and financial decisions
- Baird Trust, with more than \$15 billion in assets, provides clients the ability to grow, protect and transfer their wealth in a way that holds true to their values

More than  
**\$275** billion  
in PWM  
client assets<sup>1</sup>

## Asset Management

Baird Advisors  
Baird Equity Asset Management

Baird's fixed income and equity portfolio managers offer disciplined investing and outstanding service to institutional investors and individuals through customized portfolios and mutual funds.

- More than \$130 billion in fixed income investments managed by Baird Advisors<sup>1</sup>
- \$9 billion in equity investments managed by our U.S. and International and Global Growth teams and our Specialized Asset Management team in Baird Equity Asset Management<sup>1</sup>
- Minority interests in RiverFront Investment Group and Greenhouse Funds LP
- A Best Place to Work in Money Management for 10 consecutive years among firms our size according to *Pensions & Investments*

More than  
**\$135** billion  
in assets under  
management<sup>1</sup>

## Fixed Income Capital Markets

Fixed Income Sales & Trading  
Public Finance

Baird's Fixed Income Sales & Trading team provides investment ideas and trade execution for U.S. institutional clients. Our Public Finance professionals offer debt underwriting and advisory services to clients in the public, private and nonprofit sectors.

- Approximately 150 institutional sales, trading and analytics professionals
- More than 85 Public Finance bankers and analysts
- Ranked as the No. 1 lead managing underwriter in the nation by number of issues, No. 4 for competitive issues by par amount and No. 5 Municipal Advisor by number of issues in 2021, according to Ipreo MuniAnalytics

**No. 1** municipal bond  
underwriter  
nationwide<sup>4</sup>

## Investment Banking/ Equity Capital Markets

Advisory & Financing Services  
Equity Research, Sales, Trading

Baird's Global Investment Banking group provides M&A, capital advisory and restructuring advisory and equity financing services to companies, entrepreneurs and private equity and venture capital firms. Our Institutional Equities business provides research, sales and trading expertise to institutional investors around the globe.

- Approximately 400 banking professionals serving clients globally
- Completed more than 400 financing and advisory transactions in 2021 with a total value of more than \$182 billion
- More than 750 companies under research coverage
- Arranged more than 20,000 company-investor connections in 2021
- Strategas provides award-winning macro research to institutional investors and corporate executives

**No. 1** for knowledge  
of industries and  
companies in  
Greenwich survey<sup>3</sup>

## Private Equity

Global Private Equity (U.S., U.K., Asia)  
U.S. Venture Capital

Baird Capital, our private equity business, makes venture capital, growth equity and buyout investments in lower middle-market companies in the Industrial Solutions, Technology & Services and Healthcare sectors.

- Investments made in more than 330 portfolio companies since inception
- Over 40 investment, operating and support professionals in the United States, Europe and Asia
- Dedicated global resources to help portfolio companies accelerate growth
- Active portfolio companies have combined annual revenues of \$1.6 billion and more than 12,500 employees

**\$3.9** billion  
raised and  
managed<sup>1</sup>

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<sup>1</sup>As of December 31, 2021.

<sup>2</sup>Financial results do not reflect the consolidation of certain private equity partnerships.

<sup>3</sup>Greenwich Associates' 2021 surveys of North American Equity Investors. Surveys conducted with 95 small-cap and mid-cap fund managers, 138 generalist portfolio managers and 236 traders. Rankings for qualitative metrics based on leading research firms in surveys.

<sup>4</sup>Based on number of issues each year since 2009, according to Ipreo MuniAnalytics and Thomson Reuters.

To learn more, call 800-79-BAIRD in the United States or +44 (0)20 7488 1212 in Europe, or visit us online at [rwbaird.com](http://rwbaird.com). Trust services are provided by Baird Trust Company.

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*Baird Difference*