



PHOTOGRAPHER / SCOTT PAULUS

Robert W. Baird & Co. 777 E. Wisconsin Ave., Milwaukee

From left, Beth Kavelaris, Lori Gervais, Lori Lorenz and Robert W. Baird & Co. chairman, president and CEO Paul Purcell.

WEALTH OF EMPLOYEES

Robert W. Baird & Co. employees welcome culture of flexibility, encouragement

Lori Gervais credits her advancement at Robert W. Baird & Co. Inc. to participating in company programs.

"I've really built my career, my financial practice and my business as a financial adviser off of that," Gervais said.

The investment management firm emphasizes opportunities available to employees, called "associates," both professionally and personally.

Gervais, who began at Baird as a client relationship assistant five-and-a-half years ago, has participated in programs in financial advising, team building and mentoring through Baird University. The in-house university, which also connects to external resources, has seen courses double between 2005 and 2006, said Beth Kavelaris, director of Baird University.

All associates participated in university training last year. The programs empower associates to be leaders, she said.

"We can tailor to the real needs of our associates," Kavelaris said. "We really charge everyone to be the torchbearer of the culture."

That culture is built on the shared values of honesty, integrity and genuine concern for clients and associates, said Lori Lorenz, director of human resources. Part of Baird's mission statement — to be the best employer for the associates — drives many of the company's initiatives, she said.

"People here just really kind of walk the talk," Lorenz said.

In addition to Baird University, associates have access to \$3,000 a year of general tuition reimbursement and full reimbursement for some industry designations, for courses on almost any subject, at any institution. In the last year, Baird reimbursed tuition expenses for more than 330 courses.

Baird also offers a number of flexible scheduling options, from part-time to telecommuting to job sharing. A distinguishing feature for Baird, flexible scheduling is a business imperative for attracting and retaining associates and gives them tremendous satisfaction, Lorenz said.

"We just try to give lots of flexibility to

employees," she said. "It's about, 'What do you need, and let's try to make that work for you and the business.'"

Baird recently stepped up wellness efforts, partnering with Health Solutions to assist employees in leading healthy lives and also to control health care costs, Lorenz said. Biometric screenings had a 95 percent participation rate last year, she said. This year an on-site Weight Watchers program began, with Baird subsidizing more than half the weekly cost.

The company's emphasis on well-being is the reason for programs such as Baird Cares, which offers associates one day of paid vacation a year for community service, Lorenz said.

Gervais, who volunteers for four non-profit organizations, said she appreciates the community, the flexibility and the encouragement of her company.

"I feel that Baird offers a variety of resources and ways to build a career," she said.

— Bridget Thoreson



WEB SITE:

www.rwbaird.com

TYPE OF BUSINESS:

Employee-owned, international wealth management, capital markets, private equity and asset management firm

YEAR FOUNDED:

1919

EMPLOYEES:

1,000 LOCALLY; (2,100 companywide)

CHIEF EXECUTIVE:

Paul Purcell

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