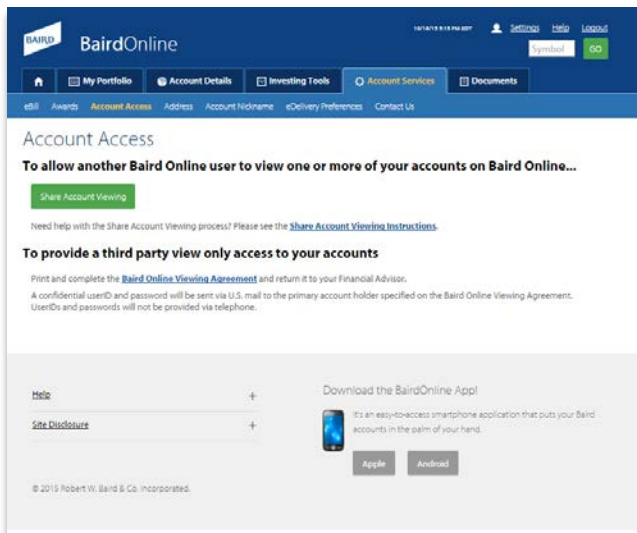




# Baird Online – Sharing Account Access

To proceed with account sharing, the person you are sharing with must have a registered Baird Online User ID. If they do not, you will need to print and complete the [Baird Online Viewing Agreement](#).

1. Click on **Account Services**, select **Account Access**, and click the **Share Account Viewing** button

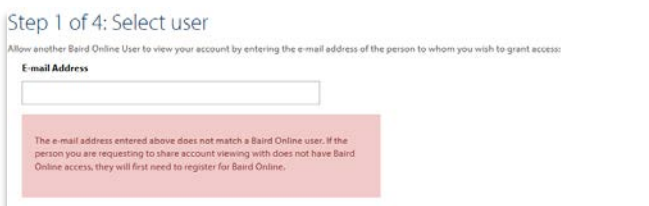


2. Enter the **e-mail address** associated with the account you would like to share your accounts with.



If the e-mail address you are looking to share account access with does not have a Baird Online User ID, you will receive the following error.

*Please contact your Financial Advisor or the Baird Online Help Desk at 1-888-212-8843 for assistance.*



## Baird Online – Sharing Account Access, *continued.*

3. Select the accounts to share by checking the **Grant Account Access** check box. Review the Terms & Conditions, and click **Next**.

**Note: You can only share the accounts of those which you have ownership associated with.**

4. Verify the selections of the accounts you would like to share. Click **Send E-mail** to complete the process.

Step 2 of 4: Select accounts

Select the account(s) you want to grant shared account viewing to:

Account Number	Account Name	Grant Account Access
10001000	A-Bank Trust	<input type="checkbox"/>
10001001	G-John Ind	<input type="checkbox"/>
21212141	E-Jon & Jane eBill	<input checked="" type="checkbox"/>
21212142	C-John Ind	<input checked="" type="checkbox"/>
21212143	F-John Ind	<input checked="" type="checkbox"/>
21212144	D-Jane Ind	<input checked="" type="checkbox"/>
21212145	B-John IRA	<input type="checkbox"/>

n/a This account is not eligible to be shared because you only have view only access to it.

**Terms & Conditions**

You must read and agree to the following "Terms & Conditions" to grant viewing access on the selected accounts.

By agreeing to the Terms & Conditions I instruct Baird to send an invitation to establish view-only access to the account(s) selected above to the e-mail address indicated. I understand that following a successful login to Baird Online via the Baird Online User ID associated with the e-mail address indicated, Baird will share my first and last name and status as a Baird client with the user.

I have read and agree to the Terms & Conditions

Step 3 of 4: Verify selections

An email requesting acceptance of shared account viewing will be sent to jghall@rwbaird.com for the following accounts:

Account Number	Account Name	Grant Account Access
10001000	A-Bank Trust	Will not share
10001001	G-John Ind	Will not share
21212141	E-Jon & Jane eBill	Requested to share
21212142	C-John Ind	Requested to share
21212143	F-John Ind	Requested to share
21212144	D-Jane Ind	Requested to share
21212145	B-John IRA	Will not share

5. The final step is confirmation the email was sent to the intended recipient. You will receive a confirmation e-mail once the recipient accepts your invitation to share your accounts online.

Step 4 of 4: Email sent

An e-mail has been sent to requesting their acceptance of your invitation to share account viewing.

If the user accepts you will be notified via e-mail to log in and verify that you are now sharing account viewing with the correct person.

Thank you.

If you have questions or need more information, please contact: Baird Online Help Desk 1-888-212-8843 or e-mail at: [bairdonline@rwbaird.com](mailto:bairdonline@rwbaird.com)