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 Client Information Instruction and Access Authorization.

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.*
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.

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.

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