



# Baird Online - Online Transfer Requests

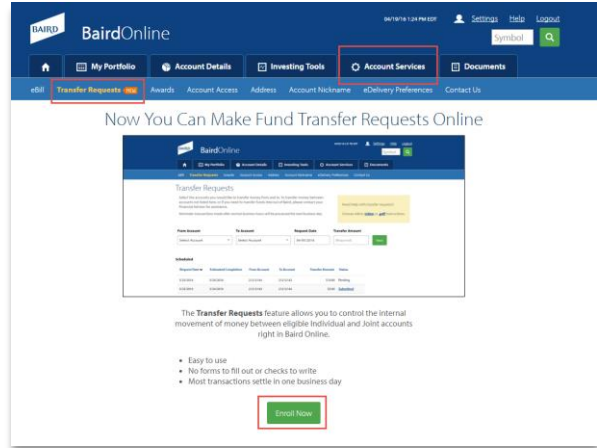
## Instructions for eligible Individual and Joint accounts to Enroll in Online Transfer Requests

### Enrolling in Online Transfer Requests

Select the **Account Services** tab

Click **Transfer Requests**

Click **Enroll Now\***



*Enrollment is a one-time process. Please review and agree to the Terms & Conditions, and your eligible accounts will then be enrolled for Online Transfer Requests.*

*\*If the Enroll Now icon is not present, you may not have accounts eligible for the Online Transfer Request feature.*

### Begin your Transfer Request

### Transfer Requests

Select the accounts you would like to transfer money from and to. To transfer money between accounts not listed here, or if you need to transfer funds into/out of Baird, please contact your Financial Advisor for assistance.

*Reminder: transactions made after normal business hours will be processed the next business day.*

Need help with transfer requests?  
Choose either [video](#) or [.pdf](#) instructions.

<b>From Baird Account<sup>1</sup></b>	<b>To Baird Account</b>	<b>Request Date</b>	<b>Transfer Amount</b>	
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>Next</b>
<input type="text" value="Select Account"/>	<input type="text" value="Select Account"/>	<input type="text" value="05/04/2016"/>	<input type="text" value="(Required)"/>	

1. **From Baird Account:** Select which account to transfer funds from. Only your available money market balances will display.
2. **To Baird Account:** Select which account you would like to transfer to. You can only transfer funds to accounts which you are an owner of.
3. **Request Date:** Select a date to schedule the transfer (same-day requests should occur within the same business day). Typical requests take one full business day to process. Post-date requests 12 months out.
4. **Transfer Amount:** Enter in a dollar amount between \$5 - \$50,000 per day of your accounts available money market funds.

## Baird Online - Online Transfer Requests, *continued*

### Review & Confirm

**Answer** one of your security questions

Click **Confirm Transfer** to proceed

#### Review Transfer Request

**From Baird Account** 21212141 - John Client Indv

**To Baird Account** 21212143 - John Client Indv

**Request Date** 05/27/2016

**Estimated Completion** 05/31/2016

**Transfer Amount** \$1,500.00

**Please answer the security question below**

What was your favorite place to visit as a child?

Cancel

Confirm Transfer

### Viewing Online Transfer Requests

#### Scheduled

Your pending Online Transfer Requests generated through Baird Online will display here.

#### Historical

A list of all Online Transfer Requests processed in the last 90 days through Baird Online will display here. To view Transfer Requests further back than 90 days, utilize the Activity page within Account Details.

#### Scheduled

Request Date ▼	Estimated Completion	From Account	To Account	Transfer Amount	Status
4/29/2016	5/2/2016	10000023	18391382	\$1,500.00	Submitted

Showing 1 of 1

#### Historical (Last 90 Days)

Show 10 entries

Request Date ▼	Processed Date	From Account	To Account	Transfer Amount	Status
4/15/2016	4/15/2016	13596467	11339758	\$1,500.00	Completed
4/15/2016	4/15/2016	13596467	11339758	\$5.00	Completed

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## Clients Frequently Asked Questions

### **Q: Where is the Enroll Now button?**

A: The Enroll Now button can be found within the Account Services section, Transfer Requests page. This button will only display when you have eligible Individual and Joint accounts. Please contact your Financial Advisor to learn more about eligible accounts.

### **Q: Do I need to sign paperwork to enroll?**

A: The online enrollment process consists of review and acceptance of the Terms & Conditions. For select types of transfer requests, you may need to have a letter of authorization on file.

### **Q: How will I be notified my account is enrolled?**

A: You will receive an email notification, and a paper letter will be sent to your accounts address of record confirming your enrollment.

### **Q: Can I transfer securities through the Transfer Request feature?**

A: The Transfer Request is built to only transfer your available Money Market funds.

### **Q: When will I receive notification of my transfer request?**

A: You will only receive an email to your Baird Online email address on file at the time you make the Online Transfer Request.

### **Q: Will I still be able to process a request through my Financial Advisor?**

A: Yes, we always welcome you to call your Financial Advisor for any transfers.

### **Q: How do I cancel an Online Transfer Request?**

A: For same-day Online Transfer Requests, please contact your Financial Advisor. For post-dated requests, you can select the “Submitted” feature within the Status column and select Cancel Transfer.

### **Q: Can I schedule a transfer from my Baird account to my bank?**

A: This feature is not available at this time.