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PRIVATE WEALTH MANAGEMENT

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As Director of Tax Planning for Baird, Tim is responsible for researching, writing and speaking on important tax issues that impact the clients of Baird. This includes topics related to retirement planning, executive compensation, business owners, legislative changes, and overall best practices.

Tim originally joined Baird in 1999 serving in a variety of planning-oriented roles, most recently as the Director of Advanced Planning. He left Baird in 2019 to join the Advisor Education team at PIMCO, before returning to Baird in 2021. Prior to 1999, Tim worked in Arthur Andersen's Private Client Services group in Milwaukee where he specialized in tax and financial planning. His clients included corporate executives, business owners and families.

Tim earned his bachelor's degree in Accounting from the University of Illinois in 1991. He is a Certified Public Accountant/Personal Financial Specialist, a CERTIFIED FINANCIAL PLANNER™ professional, a Certified Private Wealth Advisor℠ professional and a member of the American and Wisconsin Institutes of CPAs, Investments & Wealth Institute (IWI) and the Financial Planning Association (FPA).

Commentary from Tim on a wide range of financial planning topics has been featured in national, regional and trade media such as *The Wall Street Journal, Bloomberg BusinessWeek, Kiplinger's, U.S. News & World Report, Morningstar, CNBC.com,* and *InvestmentNews.* In addition, he speaks to numerous client and professional groups about tax and financial planning topics and has taught financial planning classes for IWI and at the University of Wisconsin-Madison. Tim also regularly shares his perspectives via Twitter (@TimSteffenCPA) and other social media outlets.