

# A complete platform enhanced by our partners



At Black Diamond we do what we do best, and then integrate with best-of-breed partner solutions to provide financial advisors a purposeful suite of tools to manage their client's complete wealth picture. We deliver a comprehensive approach for advisors who need an integrated technology suite consisting of portfolio management, performance reporting, financial planning, portfolio risk analysis, access to managed accounts and CRM modules.

With a dedicated support team and a single, monthly, itemized invoice – all from Black Diamond – you can empower your financial advisors to serve their clients better and more efficiently.



## FINANCIAL PLANNING

Creates a complete financial plan in minutes and adjusts plan scenarios in real-time

Starts at  
\$100/user  
per month



## PORTFOLIO RISK ANALYSIS

Captures a quantitative measurement of client risk tolerance so advisors can discuss a client's current risk level vs. how much risk they may need to reach their personal goals

Starts at  
\$145/user  
per month



## CRM

Helps strengthen relationships with clients and prospects by keeping detailed records of personal preferences, meeting notes, proactive task reminders, and synched portfolio data

Starts at  
\$80/user  
per month



## MANAGED ACCOUNTS

Provides access to traditional and alternative investment strategies through a UMA/SMA structure with low minimum, flat fees, real-time performance reporting and intraday liquidity

Starts at  
15bps\*  
+ individual manager fees

\*Black Diamond fee is waived for all assets on the SMArtX platform

1,000+  
firms

Today, Black Diamond is the platform of choice for over 1,000 advisory firms. We measure ourselves on our clients' success and look to them to help drive our product design and innovation roadmap.

To learn more, please contact us at 1-800-727-0605 or visit [blackdiamond.advent.com](https://blackdiamond.advent.com).