

Black Diamond® Wealth Platform

Revolutionizing the wealth management experience

Black Diamond solves critical challenges faced by today's growing wealth management firm



Clients expect a digital relationship with their advisor



Advisor technology continues to evolve at a rapid rate



More to do and less time to do it

With Black Diamond, advisors are empowered by:

- A partner who is looking out for you and ahead at industry changes
- Innovative, cloud based tools that strengthen connections with clients and prospects
- Best-in-class, reliable clean data that fuels client-ready dynamic reports
- Built-in integration options
- Dedicated, single point of contact service model

For Advisory:



6 of top 10
35 of top 50
60 of top 100

(Source: FA Magazine, ADV filings)

For Black Diamond:



1M+ accounts
\$600bn+ in assets

Award-winning solution trusted by over 1,000 advisory firms

Black Diamond helps financial advisors build trust with clients and attract more assets. In 2016, assets administered through Black Diamond grew by \$170 billion. It is annually recognized as one of the most important tools available for financial advisors.

We view our accolades and awards as a reflection of our clients' success and look to our clients to help inspire our design and innovation roadmap. We invite you to join the Black Diamond community.

To learn more, visit <http://blackdiamond.advent.com> or call 1-800-727-0605.