Black Diamond® Wealth Platform

The reinvented Black Diamond Investor Experience: Strengthening the advisor–investor relationship

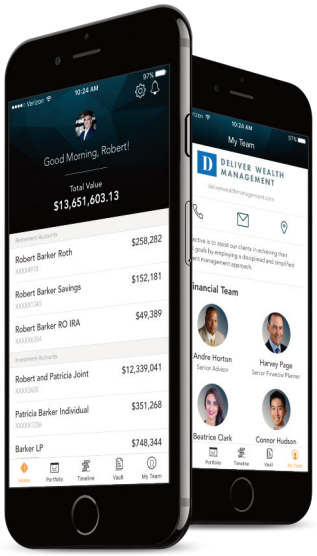
Technology is continually advancing and the expectations of users — including investors — are moving forward at a rapid pace. Investors are comparing their financial technology to their social media and music streaming experiences and they expect you to understand — and predict — their needs through personalized and engaging experiences.

As your partner, we can help you connect with your investors and further develop meaningful, long-term relationships.

More than a portal: an experience

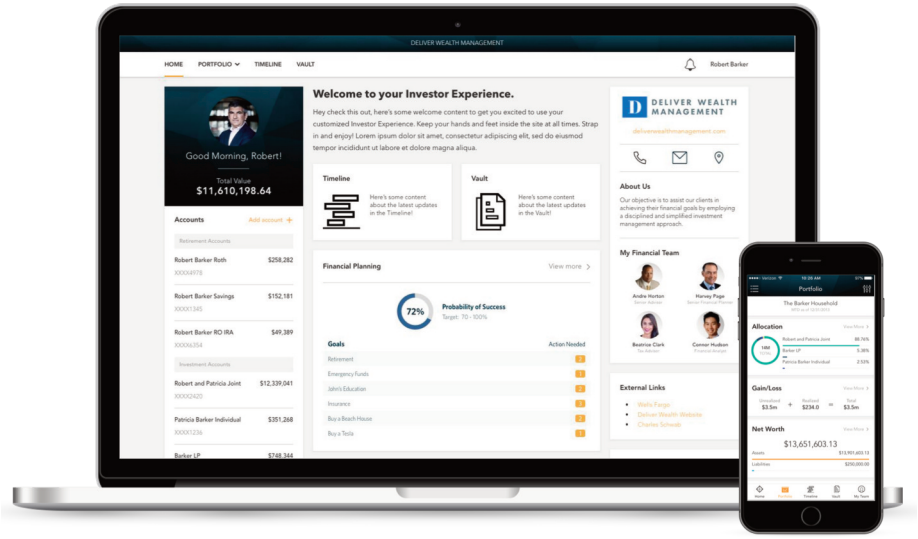
Through the Black Diamond Investor Experience, you can offer your clients a customizable, custom-branded and interactive online environment that they can access anytime, anywhere. The Investor Experience allows you to provide true value beyond reporting:

- **Personal:** Welcome your clients by name, each time they login to their experience. You have the ability to enable clients to view what is most important to them by tailoring content and market information that is applicable to their specific financial picture. Clients are empowered to customize their own experience with the ability to add a profile picture, bookmark important pages or organize document folders in a way that is most efficient for them.
- **Connected:** Making your team an integral part of your client's personalized experience is a valuable way to deepen your relationships. Within the Advisor Connection area, you can introduce your team and provide clients insight into the depth of your industry experience and expertise. From this page, clients are able to quickly schedule or request meetings, contact you via email or phone and easily locate your office via web or mobile app. Plus, the relationship timeline showcases key interactions and decisions that have occurred throughout the course of your partnership.
- **Streamlined:** From a single place, you can store and share documents using our vault tool or another third-party system like Sharefile, and you can present statements for custodial accounts. You can also expand your conversations beyond reporting through fully integrated risk communications and financial planning content.



"Personalization is crucial. When I log in, I want to know that my advisor team knows who I am. Something as simple as 'Good Morning, John!' will make a real impact."

Investor



"I want access to all of my financial information and statements in a single location."
Investor

"Simplicity and usability within a mobile app is crucial."
Investor

"Seeing my team and having a quick way to contact my advisor would really help keep me, as a client, stay engaged."
Investor

On the go access

Black Diamond's Native Mobile App allows you to demonstrate to your clients how you're helping them reach their financial goals.

- **iPhone & Android devices:** Native features such as TouchID, push notifications and connection to phone, e-mail and maps provides your clients a modern and efficient user experience.
- **Customization options:** Two options for branding your firm's personalized app are available. With minimal setup and turnaround time, your firm can direct clients to download the Black Diamond App directly from the App Store. Firm and client customizations are visible to clients once they log into the app. Or, with additional setup, your firm can opt to use a private label App that includes your firm's logo as a touch icon. To meet Apple and Google standards, additional fees do apply.

Greater investor insight

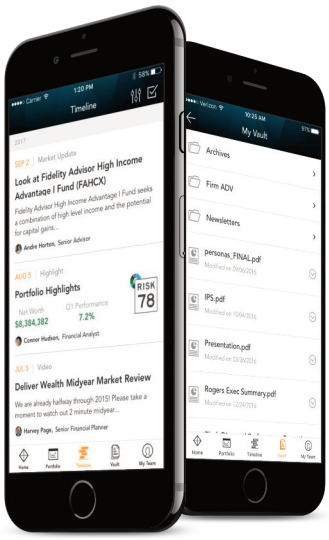
The Investor Experience gives you access to a host of features that enable you to work smarter and more efficiently on behalf of your clients.

- **Dynamic reporting:** Your personalized landing experience includes such features as an account list including holding information and recent activity, a customized portfolio reporting summary, and an upgraded document vault.
- **Data aggregation:** Additional features include a relationship timeline, account aggregation, and personal finance management.

Our service commitment

Your Black Diamond representative is available to work with you and your advisor teams every step of the way to coordinate and simplify the Investor Experience roll-out process.

Firms currently utilizing our investor portal have the option to fully transition to the upgraded experience or can choose to provide their clients a toggle between the two platforms during client transition.



For more information

We want your business to thrive. The reinvented Investor Experience is just one more way we're helping you give your clients the personalized, one-of-a-kind service they deserve.

To learn more, contact your personal Black Diamond representative, visit blackdiamond.advent.com or call 1-800-727-0605.

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