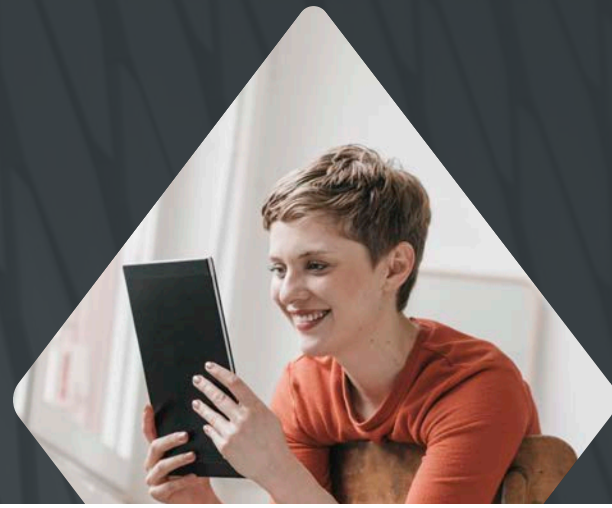
BLACK DIAMOND® CLIENT EXPERIENCE

Client Relationship Timeline



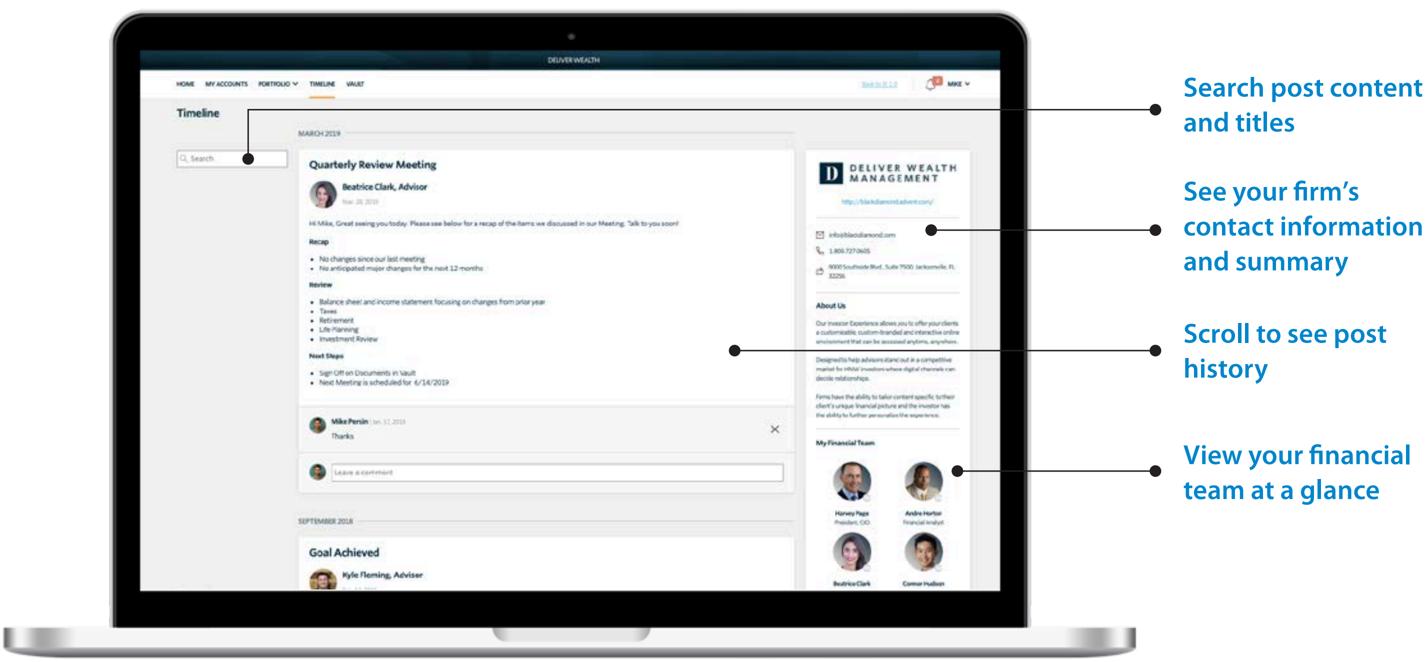
Home to your client’s financial journey

The Black Diamond Client Experience is a modern, mobile-friendly portal that amplifies the value you add by providing your clients with a holistic look at their financial lives.

Document the journey

By introducing your clients to the Relationship Timeline within the Client Experience, you, your client and other stakeholders can embark on a shared financial journey through an intuitive digital experience.

Timeline exists because clients are busy, and their financial life can be scattered between disconnected applications and websites. By showing significant information through a familiar web feed, it provides clarity by memorializing key interactions throughout your advisor-client relationship.



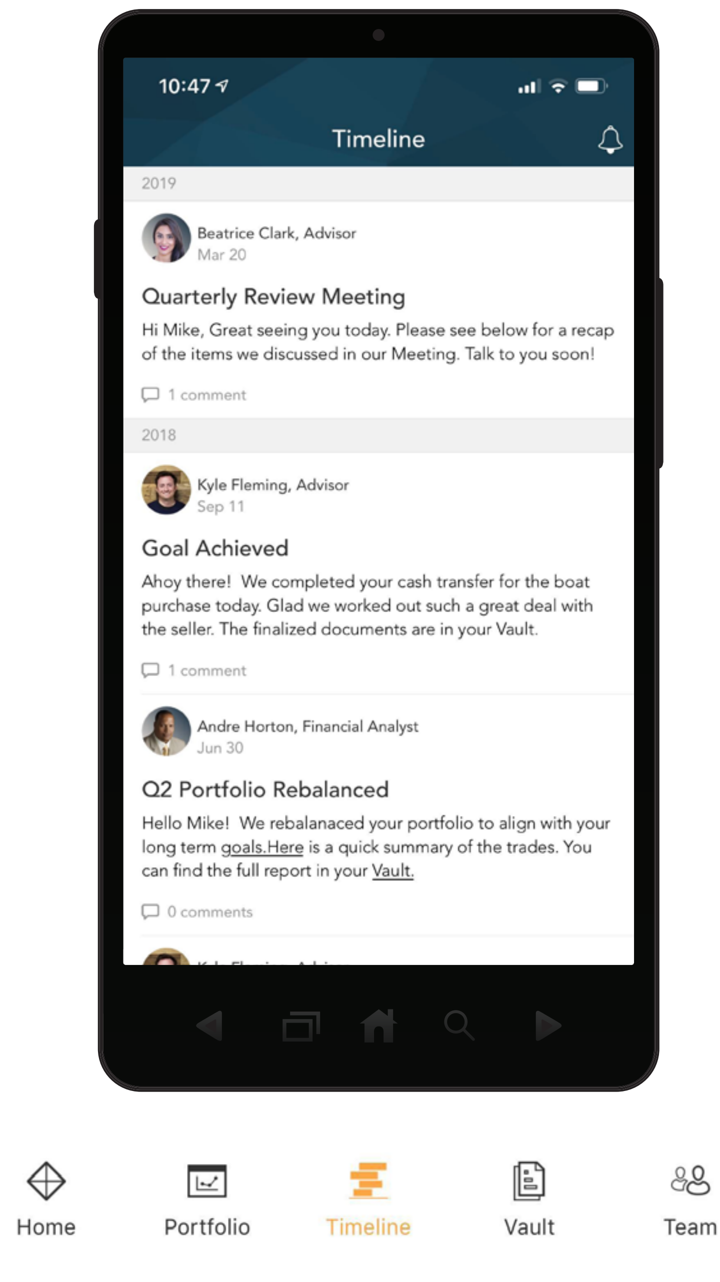
Black Diamond
WEALTH PLATFORM

blackdiamond.advent.com | info@advent.com

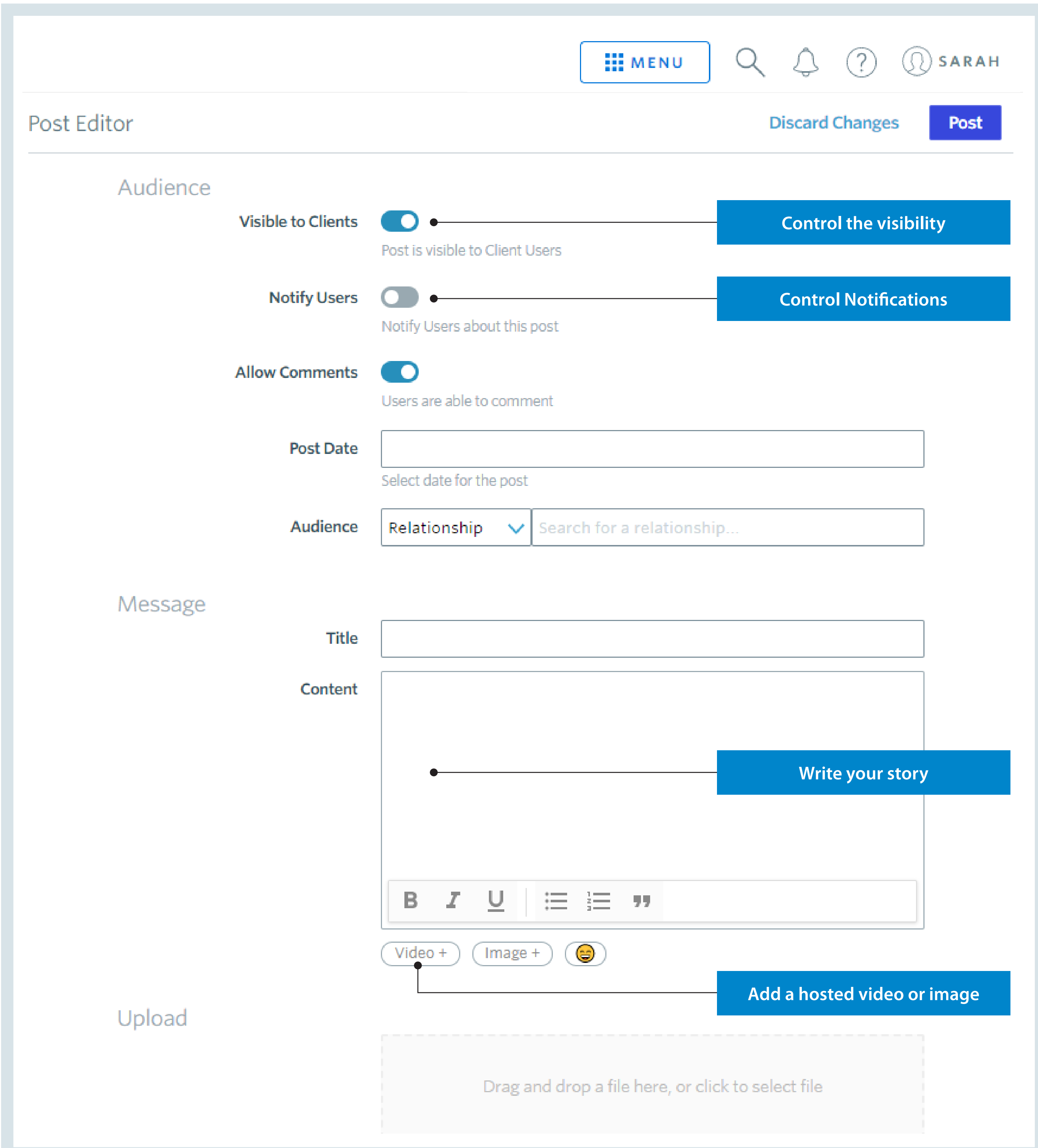
Within this trusted and secure collaborative experience, you can track the history of the advisor-client relationship and provide context around opportunities and changes. When you update Timeline with such things as meeting notes, reports, goal information and successes, your client can see how you are helping them realize their dreams.

Available at your client's point of need

Your clients can connect to their financial lives 24/7 through Black Diamond's native mobile app. Here they can view their Relationship Timeline, portfolio details, the Document Vault and more!



Through the intuitive advisor dashboard, you can easily manage the Relationship Timeline across all of your clients.



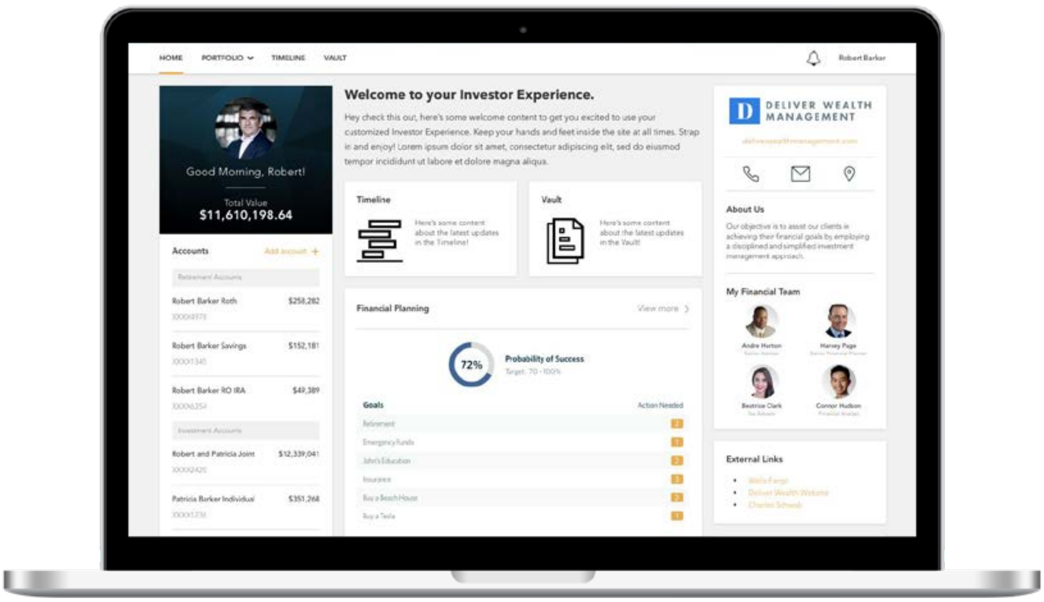
Client Relationship Timeline—
Home to your client's financial journey

About the Black Diamond Client Experience

The Client Experience is a custom-branded and interactive online environment, accessible anytime, anywhere on any device. It was designed to elevate the advisor-client dialogue to enrich relationships and demonstrate your value. Along with the Relationship Timeline, it includes a Portfolio View dashboard, Document Vault and Personal Finance page—enabling clients to see their full wealth picture.

For more information

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



Black Diamond
WEALTH PLATFORM

blackdiamond.advent.com | info@advent.com