

Client Relationship Timeline



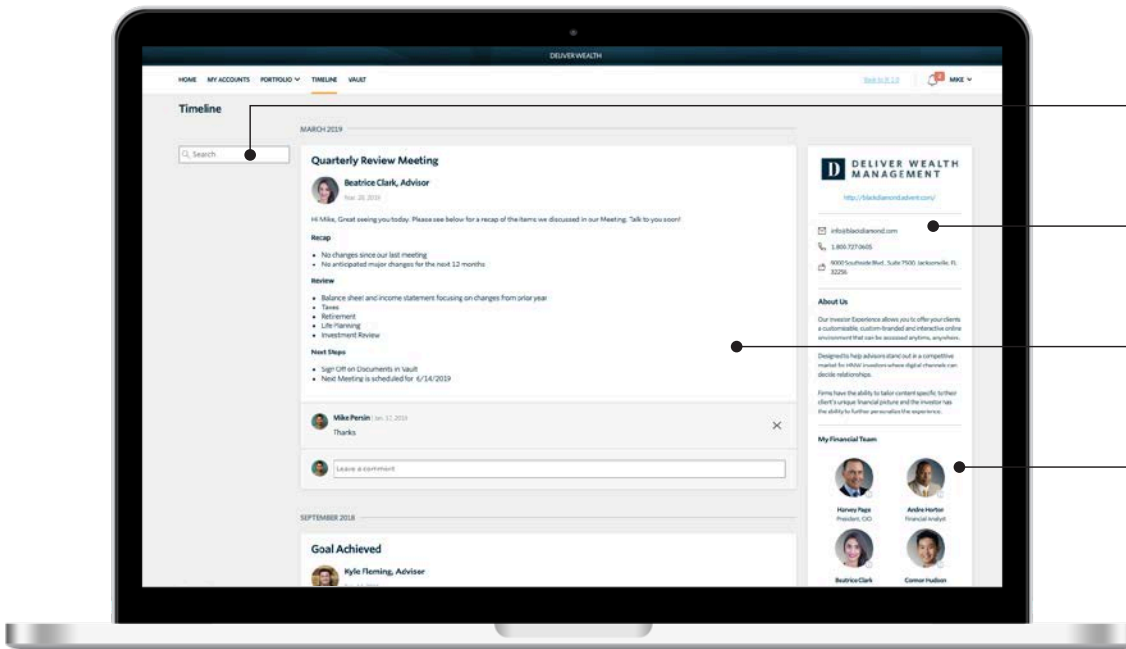
Home to your client's financial journey

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.



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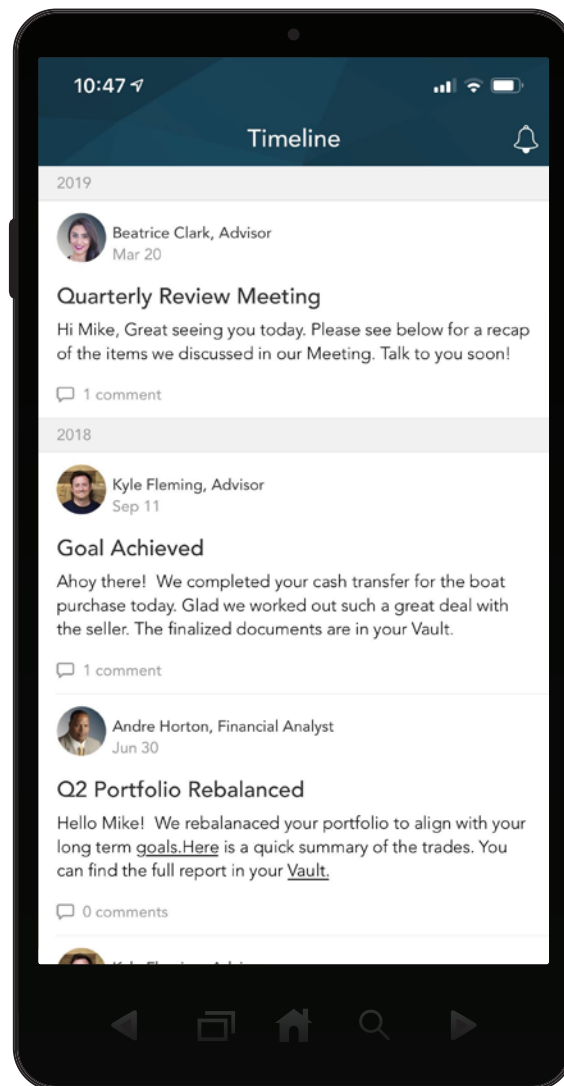
View your financial team at a glance

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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!



Home

Portfolio

Timeline

Vault

Team



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

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Post Editor Discard Changes **Post**

Audience

Visible to Clients Control the visibility
Post is visible to Client Users

Notify Users Control Notifications
Notify Users about this post

Allow Comments
Users are able to comment

Post Date
Select date for the post

Audience Relationship

Message

Title

Content
Write your story

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Add a hosted video or image

Upload

Drag and drop a file here, or click to select file

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**.

