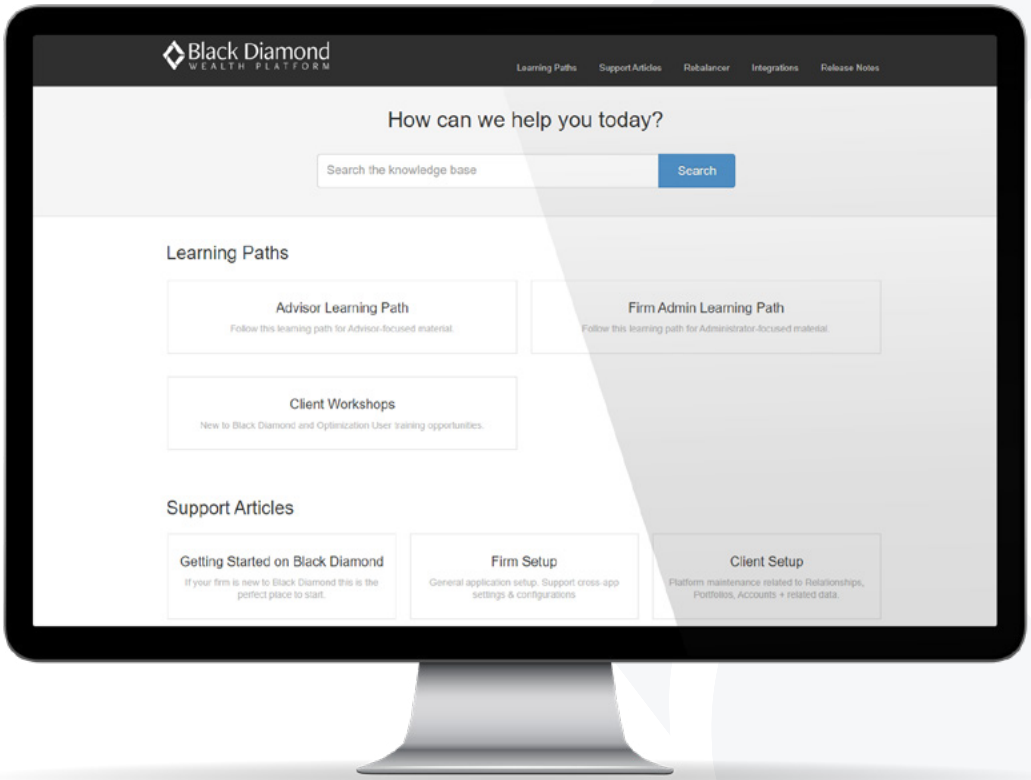
PRODUCT BRIEF

Yours is a Relationship Based Business. So is Ours.

Raising the bar with a distinct combination of industry-leading technology and best-in-class service.

With the Black Diamond® Wealth Platform, you don't just get a product. You get a solution. Through an elite combination of technology and service, your firm is empowered to make the most of Black Diamond's powerful suite of tools. With a service team of over 100 dedicated members, you receive expert assistance and gain a true technology partnership.



A comprehensive knowledge base offers an extensive collection of documents and videos for any time access.

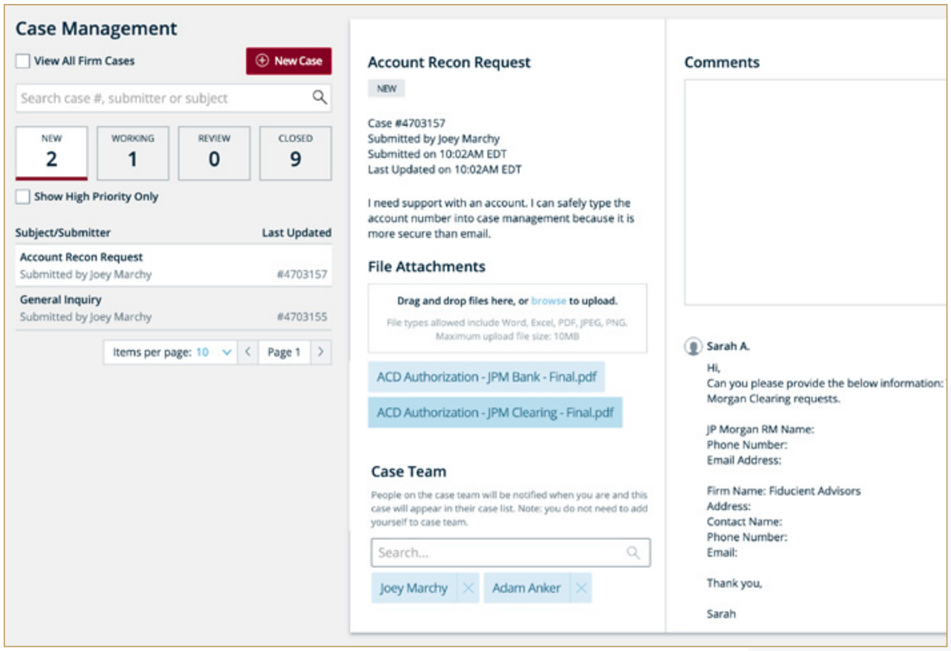
We take service seriously.

On day one, an expert implementation team greets you. Together, you work hand in hand to make your platform migration as smooth as possible. Data conversion, custom reports, client portal setup, and more, the team ensures you are properly configured to best meet the needs of your business.

Once your operations are in place, you experience a warm transition to a full-service support team, including an introduction to your dedicated service representative. Your service representative and their supporting team get to know your business and work as an extension of your back office. Available via phone, email, or through Black Diamond's native *Case Management* functionality, you are always connected.

High-tech meets high-touch.

The seamlessly integrated *Case Management* tool enables you to submit a secure support request directly to your service representative at your point of need. From there, you experience true transparency through prompt status updates and direct communication with your service representative and their supporting team. No matter if you need data research, custom reports or anything in between—you get personalized support when you need it.



Keep track of all support requests through the built-in *Case Management* tool.

Optimizing your use of the platform.

To help make advisor adoption simple and true scalability attainable, many resources are available so you can maximize your use of the platfrom.

Virtual Workshops: An ongoing series of live online workshops cover various platform topics and are designed for different levels of expertise. You can get hands-on with curriculum covering workflows, the latest platform enhancements, and best practices.

Training: A robust, two-day workshop in our Jacksonville office* allows you to dive deep into the system, meet one-on-one with your firm's service representative, and network with your industry peers. We'll even credit you to attend!

Online Learn Articles: If you are looking for instant answers, the platform is equipped with a *Contextual Support* tool that delivers relevant educational articles specific to the area of platform you are operating. Additionally, you can click into the comprehensive knowledge base and search for any topic desired. Details on all platform functionality as well as enhancement release specifics, recorded webinars, integration information, and many more resources are all available on-demand.

Your voice matters.

As a technology-enabled service organization, your input makes a difference. By voicing your ideas and feedback the enhancement roadmap evolves to meet your needs and to stay ahead of market trends.

Client Satisfaction Survey: Each year, you receive a request to provide your candid opinion on Black Diamond's service and technology. A team then analyzes all of the responses and communicates trends across the Black Diamond organization to drive change.

Great Ideas: From within the platform, you can submit enhancement requests through a *Great Ideas* feature. These ideas go directly to the product development team who track themes and make improvements directly in response to the submitted suggestions. The team places a lot of focus on these enhancement requests and over 365 individual *Great Ideas* were implemented last year.

FOR MORE INFORMATION

The unlimited, proactive, and high-touch Black Diamond service model breaks the mold and stands out as a key differentiator.

If you would like to learn how the Black Diamond Wealth Platform can support your business, call 1-800-727-0605 or email info@advent.com. You can also visit blackdiamond.advent.com

*Subject to office reopening.