

## PRODUCT BRIEF

# Easily Generate Powerful Client Reporting

## Illustrate the complete wealth picture for your client

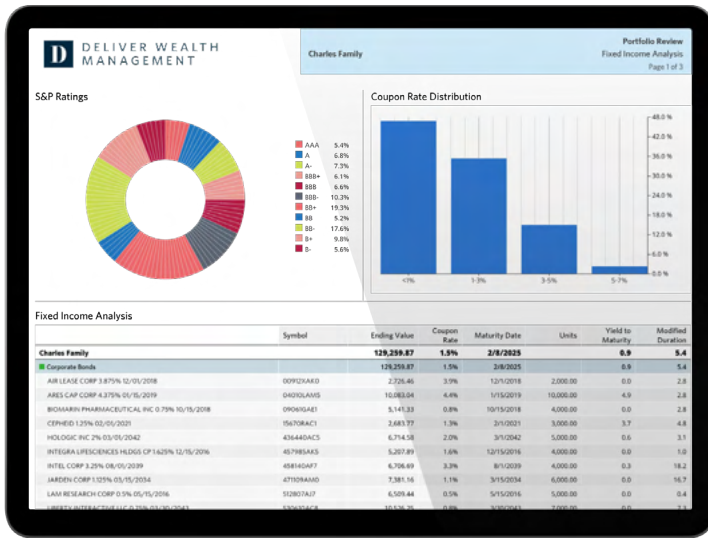
The Black Diamond® Wealth Platform gives you the power to confidently tell your story while customizing each client conversation. Highly configurable content partnered with the intuitive design of our *Report Builder* allows you to reach your clients at their point of need—anytime, anywhere. This 24x7 transparency helps you demonstrate your value to prospects while strengthening your existing client relationships.

Designed so you can easily showcase complex content and enhance your value proposition—the reports generated within Black Diamond are:

- Client-ready and fueled by reliable, clean data
- Configurable and customizable so they fit your firm's branding
- Optimized for smartphone, tablet or desktop viewing
- Incredibly flexible so you are able to make on-demand changes
- Backed by the support of a dedicated, full-service team



**Portfolio Overview:** Through an endless combination of data points, date ranges, and drag and drop page ordering, you can tell your story in a way that resonates with your clients.



**Fixed Income Analysis:** Improve clarity by using supplementary data points designed to help investors understand the composition of their fixed income portfolio.



**Portfolio Appraisal:** Enjoy the flexibility of Black Diamond by breaking down your investors' holdings in a way that complements your value proposition.

## Tailor your conversations

Create customized, branded reports from hundreds of object-driven templates or build your own template using *Report Builder's* simple drag-and-drop tool. System flexibility enables you to make on-demand changes to existing reports, or generate ad hoc reports on the fly, either for internal management or in response to client questions.

## Make an impact

Impress clients by presenting portfolio and performance data through the use of powerful graphical formats in a personalized and effective way. By leveraging user-friendly tools and focusing conversations on what really matters to each client, you'll demonstrate how you're helping them reach their financial goals.

Black Diamond comes equipped and ready to help you generate an entire portfolio of reports, including but not limited to:

- Quarterly Performance Reports
- Portfolio Appraisals
- Tax Packages
- Fixed Income Summaries
- Transactions Reports

## Grow your back office

You can leverage the power of both your dedicated Black Diamond Client Advocate and our full-service Reports Team to create a true extension of your back office. From start to finish, our team can provide a comprehensive audit of your data, run and batch quarterly statements, and seamlessly post reports directly to your *Client Experience* portal. From time-sensitive issues to custom branded templates our team is available to assist. No matter how big or small, help is ready when you need it.

## FOR MORE INFORMATION

Our robust reporting capabilities are in-depth, yet intuitive and configurable so you can effortlessly create on-demand reports to fit your clients' needs. With a team dedicated to your success, you will see first-hand how we are revolutionizing the wealth management experience.

If you have questions, or would like to learn how the Black Diamond Wealth Platform can support your business, contact your personal Black Diamond representative, call 1-800-727-0605 or [email info@advent.com](mailto:info@advent.com). You can also visit [blackdiamond.advent.com](http://blackdiamond.advent.com)