Black Diamond® Link: Modernize the User Experience

Engage clients more effectively and strengthen relationships.

Attracting and growing client relationships are key measures of success in your business. More importantly, keeping clients *engaged* is what truly creates enduring bonds.

Now, firms that use their own portfolio management solution can leverage a set of technology tools designed to strengthen client engagement while improving advisor efficiency. Black Diamond® Link allows you to take advantage of key features of our award-winning, cloud-based Black Diamond platform without having to undergo a system migration—leveraging the power of your core portfolio management and accounting platform.

Specifically, Black Diamond Link gives you access to:

- A mobile friendly client interaction environment
- Tools for greater advisor efficiency and more productive client meetings
- Expanded reporting options to tell your story in the most compelling way
- An extensive network of integration partners for a unified wealth management experience
- Powerful data mining and aggregation capabilities

More than a portal: An experience

With Black Diamond Link, you can offer clients easy access to the Client Experience—a customizable, custom-branded and interactive online environment that clients can access anytime. The Client Experience allows clients to:

Review portfolios at their convenience

You can easily configure the experience to the needs of specific client types or even individual end clients. Clients can review their holdings and portfolio performance any time they choose, at the level of detail that suits their specific investment goals and interests.

View their aggregated net worth

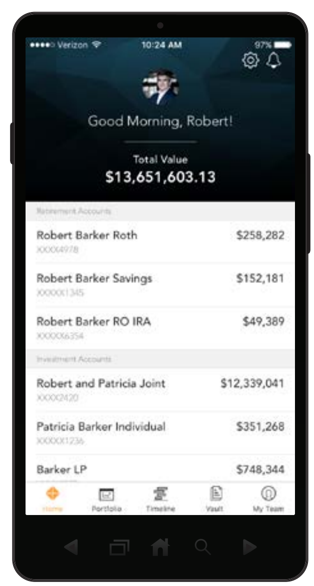
You can work with clients to incorporate assets other than those managed by your firm, including bank and brokerage accounts, 401(k) plans and more. This gives you and your clients a complete picture of their wealth.

Receive and exchange documents electronically

A built-in Document Vault enables you to automatically post client statements and reports from your portfolio management solution, as well as your firm's market commentary, Form ADV and other disclosures. It also provides a secure means of exchanging official documents, agreements and forms with the client.

View financial planning content

The Client Experience leverages Black Diamond's deep integration with popular financial planning and risk alignment tools. You and your clients can review financial planning insights, such as how portfolios are tracking against goals, all within one platform.



The Client Experience portal enables clients to view a current, complete picture of their wealth at their convenience.

Black Diamond
WEALTH PLATFORM

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Reach an unparalleled level of productivity.

The advisor experience: Work smarter

Black Diamond Link gives you access to a host of features that enable you to work smarter—meaning both more efficiently and better informed.

Streamline presentation and meeting preparation

Presentation Mode dramatically simplifies meeting prep, enabling you to create a more polished, dynamic and engaging presentation with far less time and effort.

Gain insights into client relationships

Deep, two-way integration with widely used CRM systems makes it easy to access, maintain and update client information through a single sign-on interface.

View portfolios from a variety of angles

Portfolio View dashboards give you a holistic view of client portfolios from different perspectives, from high-level performance down to transaction details for individual clients.

Leverage data mining for fast answers and sharp insights

The Data Mining tool allows fast and easy querying of your portfolio system's data stored in the Black Diamond database. Quickly display and export the data you need for analysis, research, reporting or any other business purpose.

Glean better business intelligence

Firm principals and executives can easily take the pulse on overall business performance. With information displayed in powerful graphical formats, you can quickly visualize how the firm is doing on net asset flows, revenue by client, performance by advisor and many other key metrics.

Solve your "technology puzzle" in one platform

The large and growing network of Black Diamond integration partners enables you to choose and use leading-edge financial solutions through a single interface, effectively creating an "all-in-one" wealth advisory platform.

Expand your reporting options

With Black Diamond Link, you have the option to leverage the platform's enhanced reporting capabilities, like the Report Builder tool as well as batch report processing. These features are all designed to help you tell your unique story more effectively, explain your strategies and demonstrate the value you deliver for clients.

Report Builder gives you the ability to create your own templates.

Report Builder

Create highly customized, branded reports using standard templates, or build your own template using a simple drag-and-drop tool.

Ad hoc reports on the fly

Black Diamond's flexible reporting capabilities enable you to generate one-off reports quickly, either for internal management or in response to client questions.

For more information

Take advantage of Black Diamond Link to add extra depth and breadth to your service offering, combining innovative client engagement capabilities with a powerful portfolio management infrastructure. All without adding extra hardware, software or IT complexity.

Talk to your SS&C Advent Relationship Manager or Account Executive about adding Black Diamond Link to your platform, or contact sales@advent.com.

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The Black Diamond Wealth Platform is a product of SS&C Advent. PB-009-BD