SS&C | Black Diamond WEALTH PLATFORM

PRODUCT BRIEF

Client Experience Portal

Home to your client's entire financial life.

Demonstrate your value and empower your clients through an immersive digital financial hub. The Black Diamond® Wealth Platform comes with a best-in-class *Client Experience* portal that connects you with your clients so you can further develop meaningful, long-term relationships.

The interactive and secure online environment provides your clients anytime, anywhere access to their financial life. With you at the helm, the firm branded experience goes beyond portfolio metrics so clients gain a 360-degree view of their complete wealth picture.

More than a portal: An experience

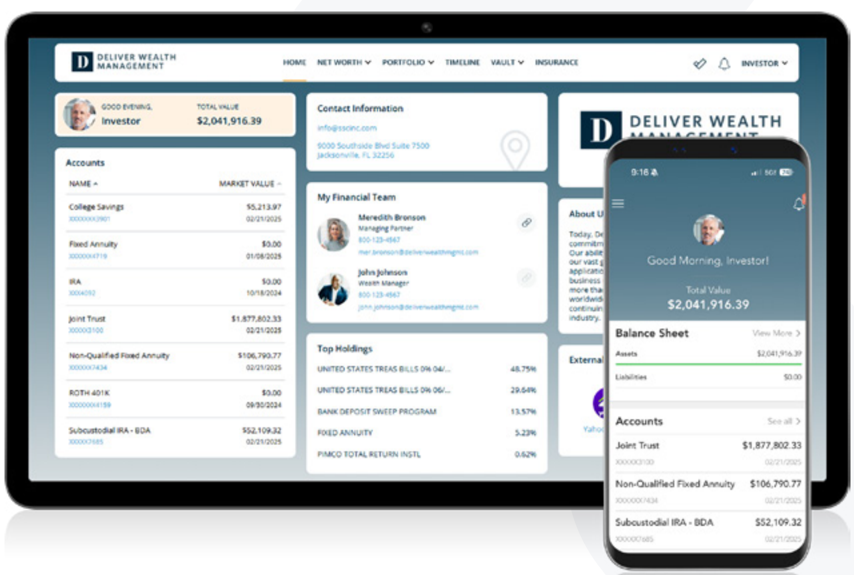
As a powerful, comprehensive application, the *Client Experience* portal is the go-to place for all things related to your clients' financial lives. It's the gateway to their portfolio performance, net worth and balance sheet reporting, financial planning content, risk metrics, important documents, advisor team communications, and so much more. All with the security of having their advisor there, helping them accomplish their goals.

With the *Client Experience* portal, you can:

Empower clients with a personalized, welcoming space.

At-a-Glance Insights: Upon login, greet clients with a warm hello message and their total asset value. The home dashboard also provides a list of categorized accounts according to goal, with the option to include alternative investments and outside accounts, so they can confidently understand the fundamentals.

Client Controls: Enable clients to make the portal their own. The ability to add a profile picture, select securities to track via a real-time watch list, and organize document folders allows them to add their personal touch.



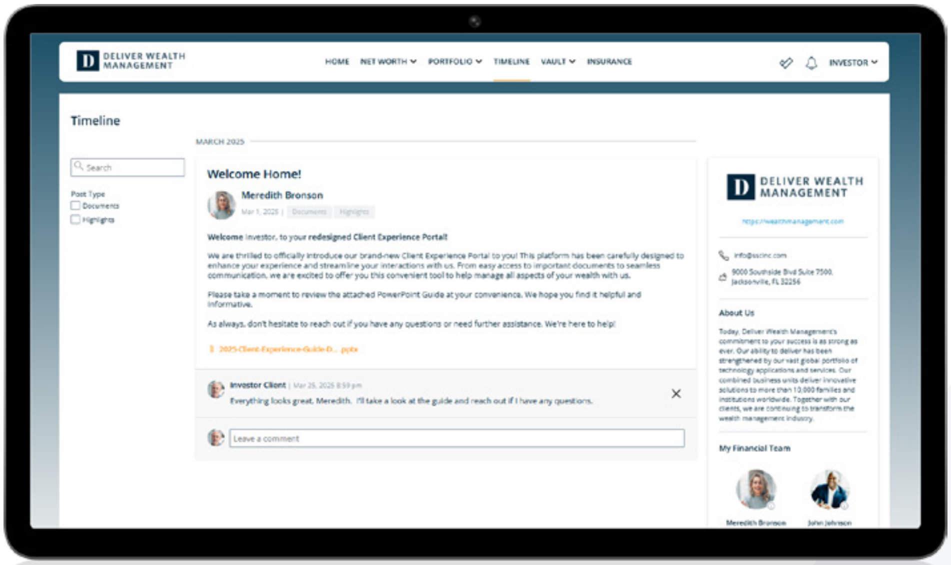
Welcome clients with a firm-branded space featuring tailored content and clickable team contact details

Connect with clients in a dependable, trackable, and accessible way.

Timeline: Communicate financial plans, real-time updates, meeting notes, goal progress, documents, news articles, and more. This interactive web feed between the client and financial team is searchable and keeps track of all interactions. Upon sending, the client receives an immediate notification on their mobile device with the option to post a response in return.

To-Do List: Remind clients of upcoming tasks like uploading a document to the *Vaul*t, adding an outside account for net worth reporting, or directing them to DocuSign® for a required signature.

Financial Team Details: Provide financial team accessibility with contact details that allow clients to quickly schedule or request meetings, contact you via email or phone, and easily locate your office via the web or mobile app.



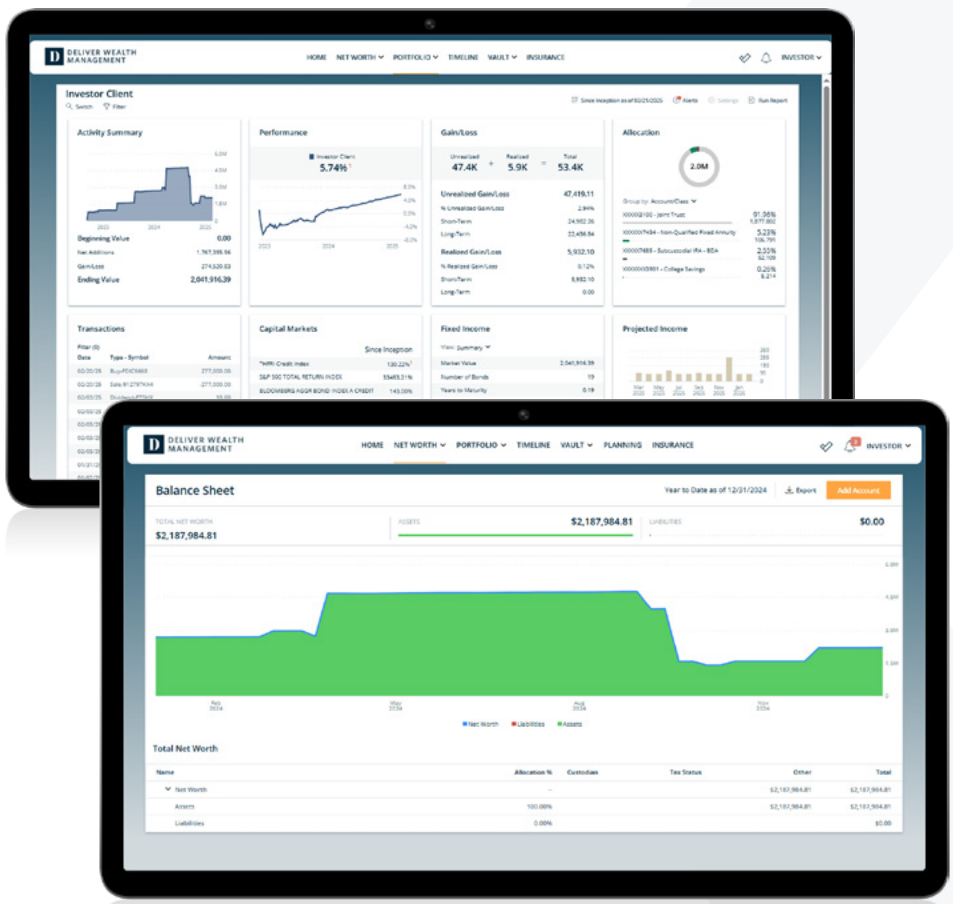
Document the financial journey by posting meeting notes and important decisions on *Timeline*

Provide well-rounded insights that accurately depict financial standing and clearly demonstrates your value.

Portfolio Reporting: Have your strategies come to life through a dynamic dashboard where clients can arrange choice metric cards to fit their preferences. Card options include activity summary, performance, alternative investments, transactions, allocations, plus many more and each expands for additional details. Configurable settings, adjustable date ranges, account filters, and more provide clients with much-desired flexibility.

Outside Account Aggregation: Encourage clients to incorporate outside accounts such as bank accounts, credit cards, 401k plans, and annuities. Adding and managing the accounts is straightforward and a detailed list includes balances, custodian, and aggregation status. By serving as your clients' holistic financial hub, you gain awareness of their complete wealth picture—an opportunity to provide deeper advice and demonstrate even more of your value.

Balance Sheet: Unite all assets and liabilities within a collaborative account-aggregated balance sheet that's built to support even the most complex family structures. An account-level breakdown allows clients to visualize changes over time and clearly shows their total assets, liabilities, and net worth.



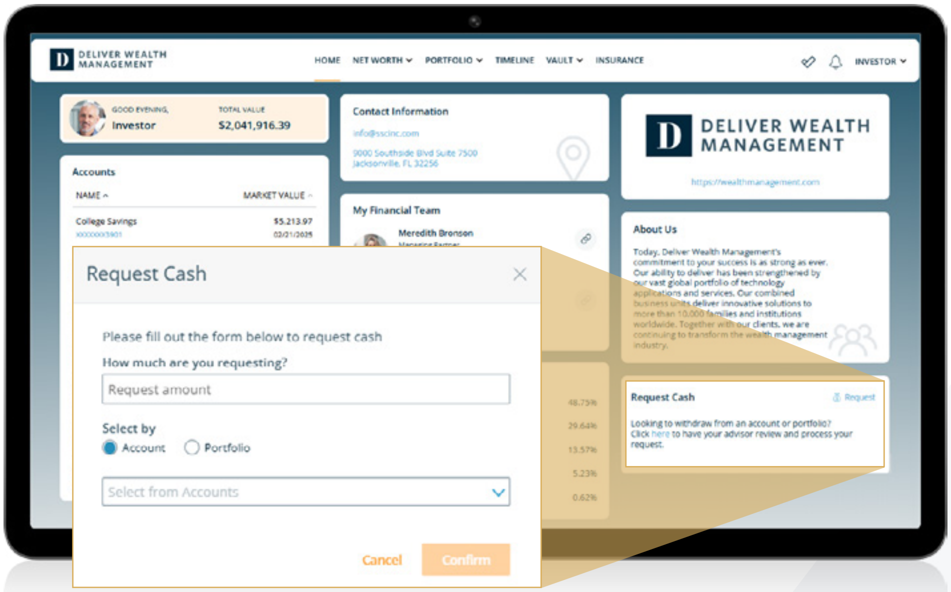
Dynamic metrics can be accessed through a configurable portfolio dashboard and a collaborative balance sheet

Save time and make life easier with streamlined workflows.

Document Vault: Leverage a two-way, secure document vault to make sending, storing, and auditing files—such as custodial statements—a seamless experience between you and your clients.

Cash Requests: Make it simple for your clients to request cash. A short form allows them to specify the cash amount and the portfolio or account from which to withdraw the funds. Automatically, you receive notification and a raise cash session initiates within the *Rebalancer* application. Once complete, the *Billing* application updates the records indicating that the appropriate amount of cash is now available in the accounts.

Integration: Deepen client insights by adding third-party risk metrics and look to the future with financial planning content. There's also a connection to external document storage through Box or ShareFile if you choose to use something other than the native *Vault*.



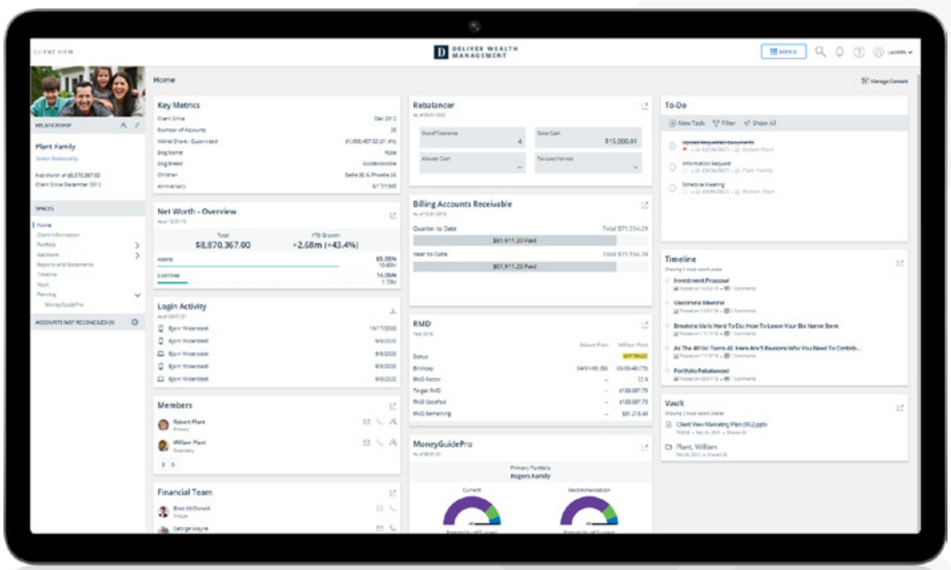
Clients can request cash directly from the portal initiating ***Rebalancer*** follow through

Deliver a tailor-made experience.

Client Profiles: Create profiles that suit unique client needs or advisory style. This way you can turn on or off various features depending on the type of client or the financial team.

Prospecting: Capture your prospects' attention by giving them trial access to the *Client Experience* portal. Or, use existing demo portfolios to walk them through the site so you can highlight your premier service and offerings.

Advisor Command Center: Benefit from a centralized, one-stop-shop where you can drive the interactions and financial information your clients see within their *Client Experience* portal. Known as Black Diamond's *Client View* application, you can manage portfolios, run reports, share documents to the *Vault*, communicate on *Timeline*, update client information, and more.



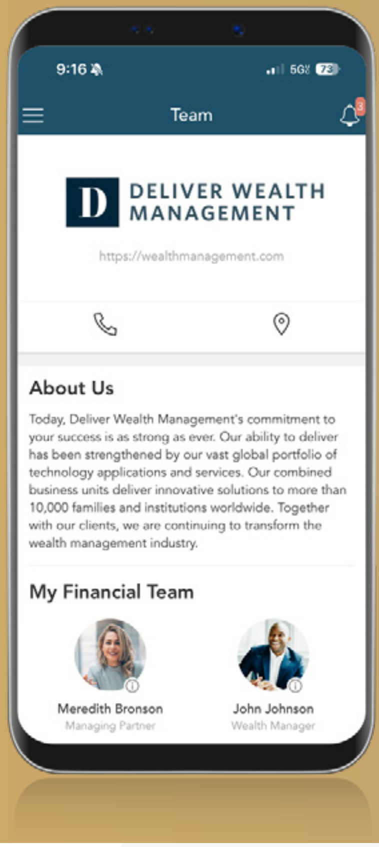
The ***Client View*** application is a command center to manage your clients' financial lives while driving their digital experience

On the go access

By simply downloading the application on an iPhone or Android device, your clients have 24/7 access to their financial life within a single application. The real time push notifications along with the single-click connection to phone, e-mail, and maps provides your clients a modern and efficient user experience.

Customization options

Two options for branding your firm's personalized app are available. With minimal setup and turnaround time, your firm can direct clients to download the Black Diamond app directly from the App Store. Firm and client customizations are visible to clients once they log into the app. Or, with additional setup, your firm can opt to use a private label app that includes your firm's logo as a touch icon. To meet Apple and Google standards, additional fees do apply.



FOR MORE INFORMATION

Black Diamond's *Client Experience* portal transforms how financial lives are managed by supporting effective dialogue and delivering past, present, and future financial insights—all within a single application. And, your clients see you as the driving force behind that value.

To learn more, contact your Black Diamond representative, visit blackdiamond.advent.com or call 1-800-727-0605.