SS&C | Black Diamond WEALTH PLATFORM

PRODUCT BRIEF

Client Relationship Timeline

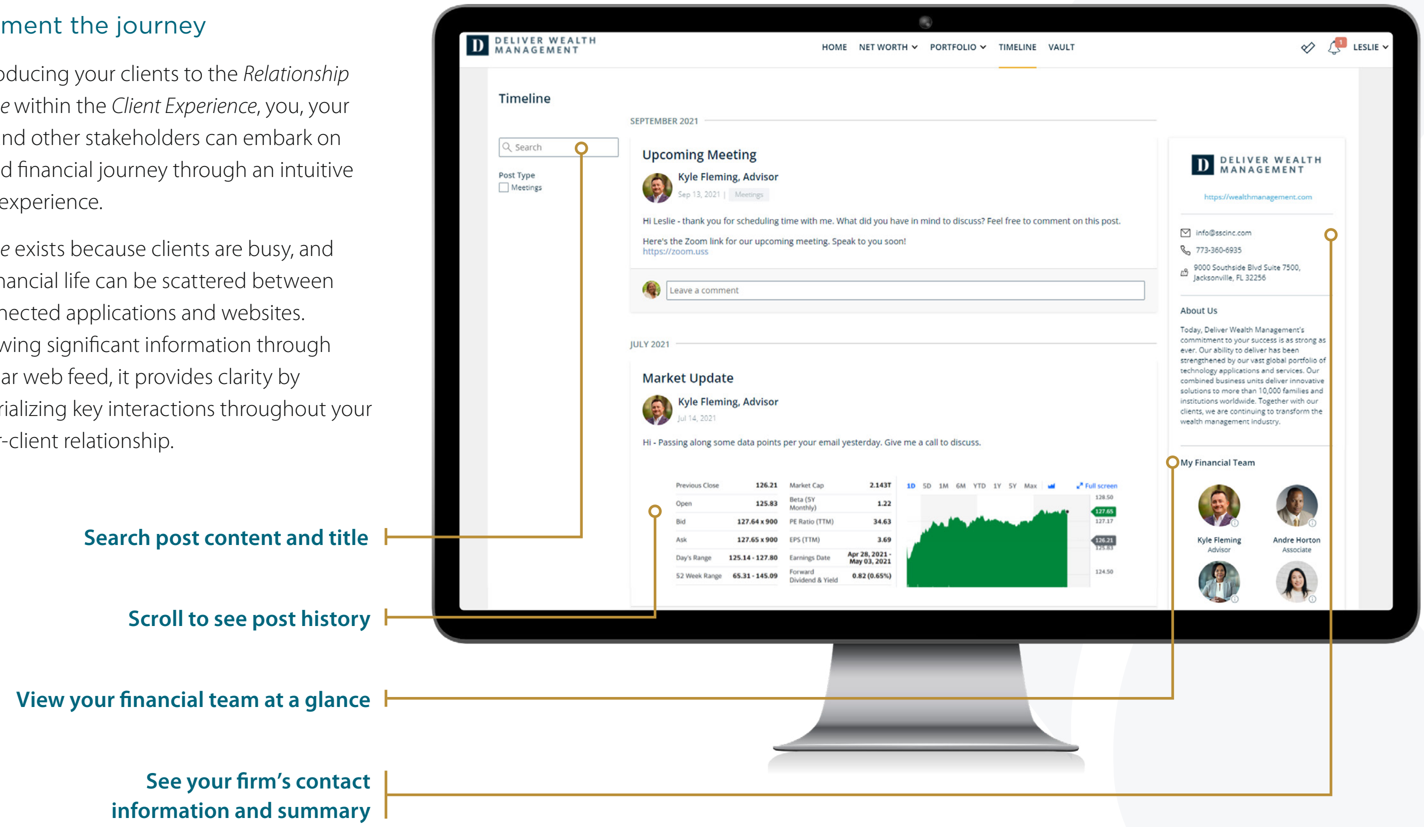
Home to your client's financial journey.

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.

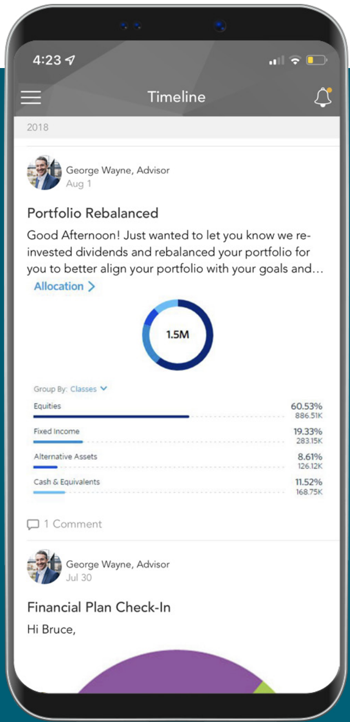
Timeline exists because clients are busy, and their financial life can be scattered between disconnected applications and websites. By showing significant information through a familiar web feed, it provides clarity by memorializing key interactions throughout your advisor-client relationship.



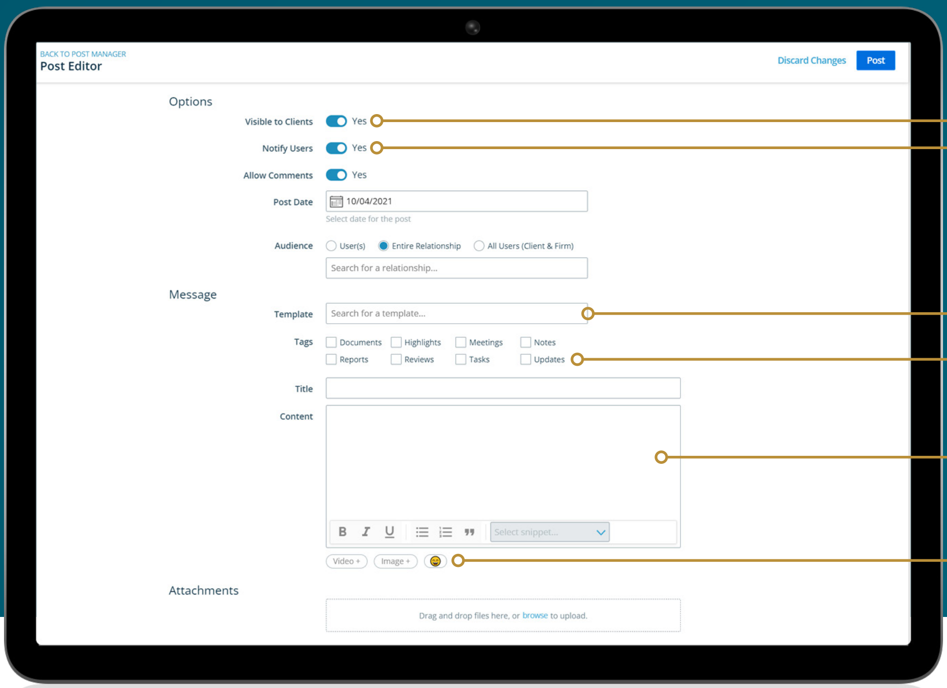
Within this trusted and secure collaborative experience, you can track the history of the advisor-client relationship and provide context around opportunities and changes. When you update *Relationship Timeline* with such things as meeting notes, reports, goal information and successes, your client can 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!



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



Control the visibility
Control notifications

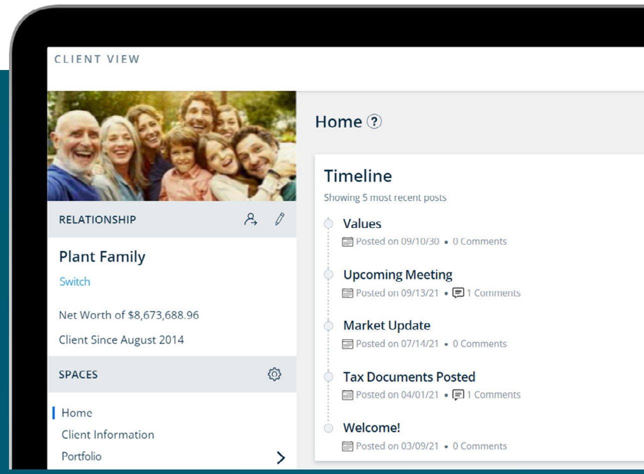
Choose an existing template to quickly create a post
Assign a tag to allow your client to filter on their *Timeline* Feed

Write your story

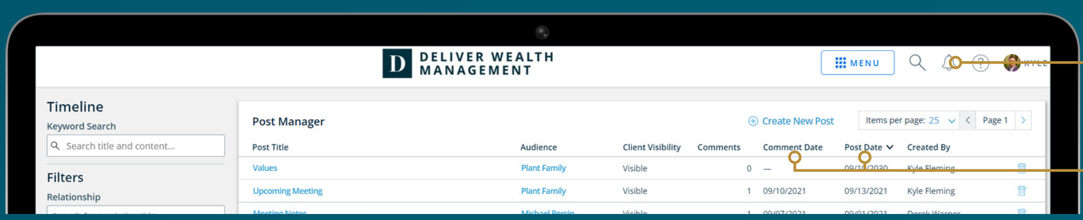
Add a hosted video or image

The *Relationship Timeline* was designed to provide a best-in-class user experience for both the investor and advisor. Advisors can easily see the top posts, sort by top post activity, and save frequently used *Timeline Posts* as future post templates.

See the top posts for the relationship on your customizable home screen in *Client View*.



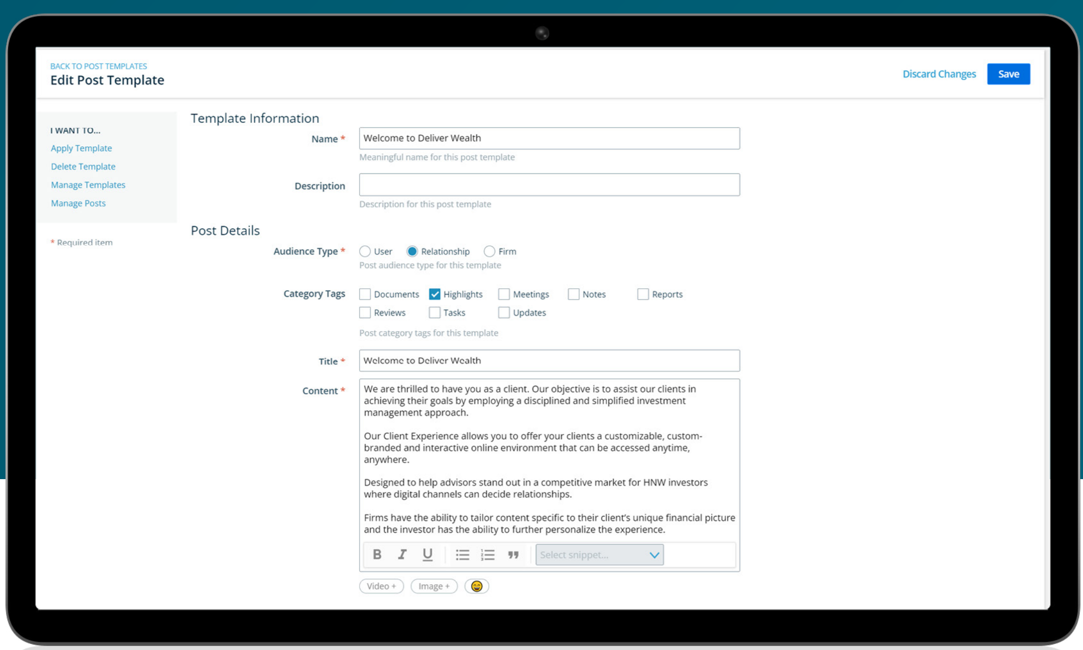
***Post Manager* gives you a view into all of the *Timeline Posts*.**



Receive notifications when new comments are added

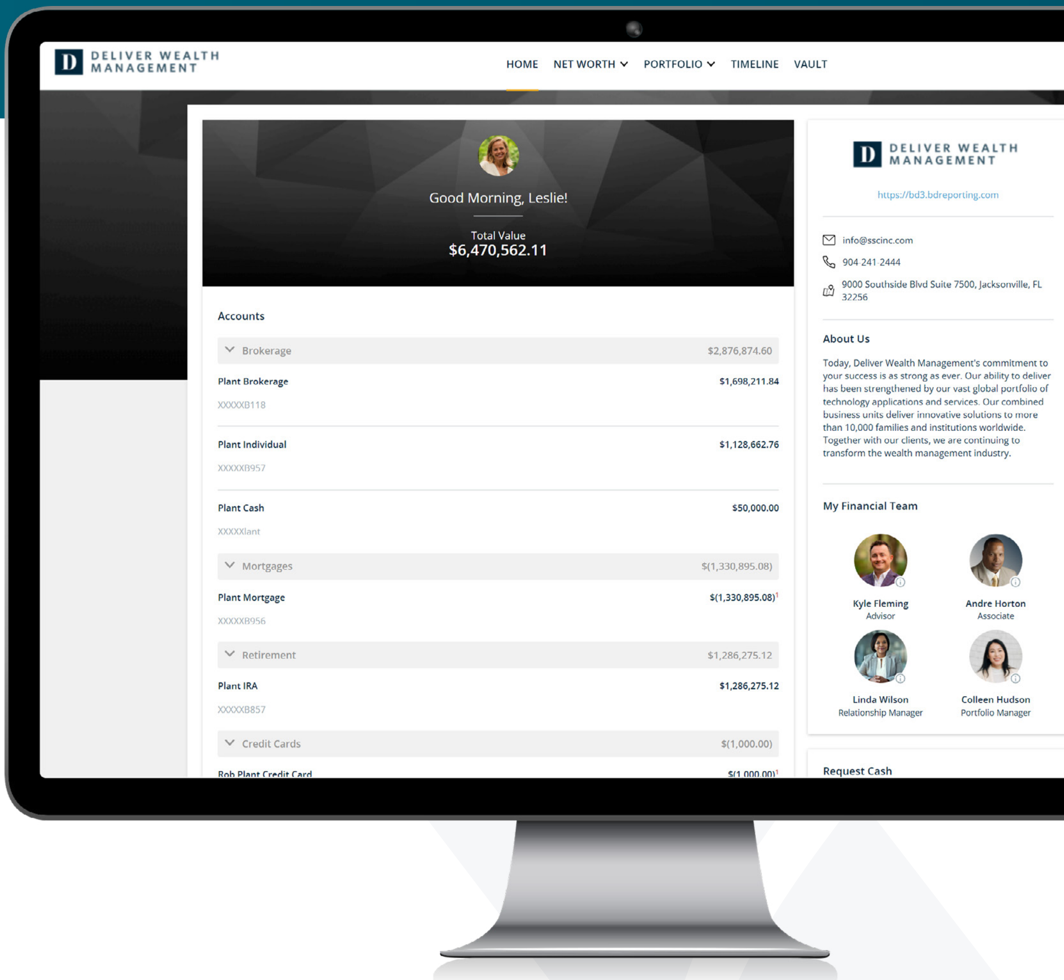
Sort the view by *Post Date* or *Comment Date* to see recent activity

***Post Editor* allows you to save frequently used *Timeline Posts* as templates for quick creation. For example, a welcome post that all clients receive.**



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 Space* dashboard, *Document Vault* and *Personal Finance* page—enabling clients to see their full wealth picture.



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.

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