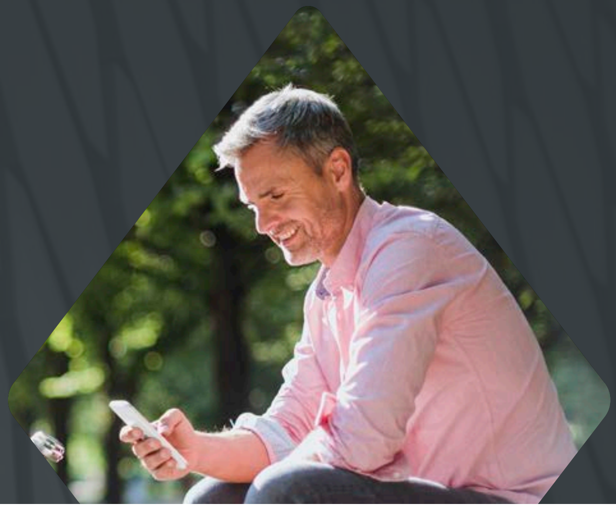
The Black Diamond® Client Experience



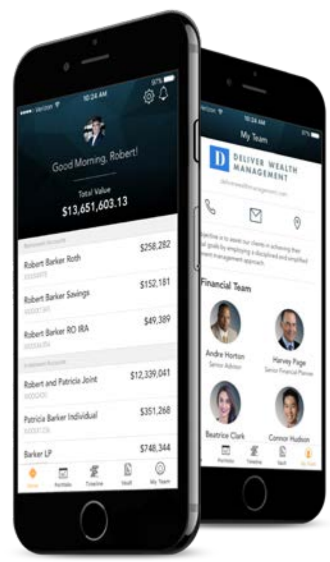
Strengthening the advisor–client relationship

Technology is continually advancing and the expectations of users—including investors—are moving forward at a rapid pace. Your clients are comparing their financial technology to their social media and music streaming experiences and they expect you to understand—and predict—their needs through personalized and engaging experiences. As your partner, we can help you connect with your clients and further develop meaningful, long-term relationships.

More than a portal: An experience

Through the Black Diamond® Client Experience, you can offer your clients a customizable, custom-branded and interactive online environment that they can access anytime, anywhere. The Client Experience allows you to demonstrate your true value through a premium online experience that is:

- **Personal:** Welcome your clients by name, each time they log in. You have the ability to enable clients to view what is most important to them by tailoring the content and market information that is applicable to their specific financial picture. Clients are empowered to customize their own experience with the ability to add a profile picture, select securities to track via a real-time watch list, bookmark important pages or organize document folders in a way that is most efficient for them.
- **Connected:** Making your team an integral part of your client's personalized experience is a valuable way to deepen your relationships. Within the Advisor Connection area, you can introduce your team and provide clients insight into the depth of your industry experience and expertise. From this page, clients are able to quickly schedule or request meetings, contact you via email or phone and easily locate your office via web or mobile app. Plus, the Relationship Timeline showcases key interactions and decisions that have occurred throughout the course of your partnership.
- **Streamlined:** From a single place you can store and share documents, like custodial account statements, using our native Vault tool or by leveraging the integration with Box and Sharefile. You can also expand your conversations beyond reporting through fully integrated risk communications and financial planning content.



"Personalization is crucial. When I log in, I want to know that my advisor team knows who I am. Something as simple as 'Good Morning, John!' will make a real impact." **— Investor**

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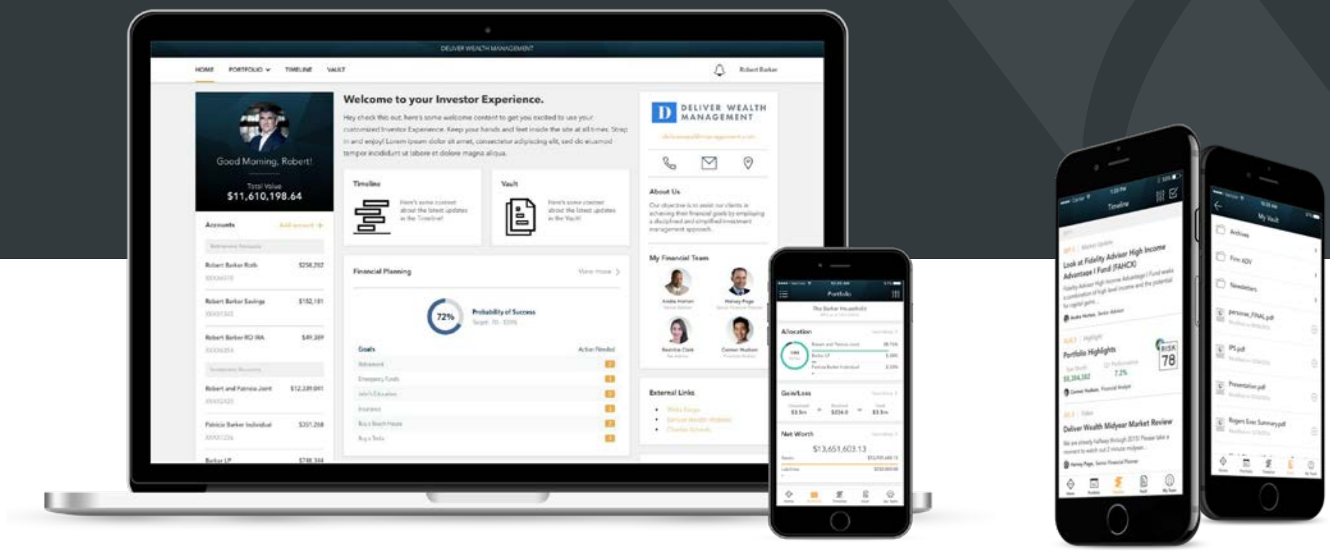

On the go access

Black Diamond's native mobile app allows you to demonstrate to your clients how you're helping them reach their financial goals.

- **iPhone and Android devices:** Native features such as TouchID, push notifications and 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.

Greater investor insight

The Client Experience gives you access to a host of features that enable you to work smarter and more efficiently on behalf of your clients.

- **Dynamic reporting:** The personalized landing experience includes features like an account list with holding information and recent activity, a customized portfolio reporting summary, and a secure document vault.
- **Data aggregation:** By pulling outside assets, holdings and liabilities into the portal, clients get a holistic view of their financial position through features like an account aggregated balance sheet. By serving as the financial hub for your clients, you get a glimpse into their complete wealth picture and can provide even more insight and value.
- **Document the journey:** Through the Relationship Timeline you can memorialize key interactions throughout your advisor-client relationship within a familiar web feed.

"I want access to all of my financial information and statements in a single location."
—Investor

"Simplicity and usability within a mobile app is crucial." **—Investor**

"Seeing my team and having a quick way to contact my advisor would really help keep me, as a client, stay engaged." **—Investor**

For more information

We want your business to thrive. The Client Experience is just one more way we're helping you give your clients the personalized, one-of-a-kind service they deserve.

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

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