Client View Application

Client-Focused Technology That Works the Way You Do

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Client View

Home of your day-to-day client communication and financial management needs.

Client View is an intuitive application within the Black Diamond® Wealth Platform that works as your client command center. From within this centralized space, you are able to manage your client's financial life while driving their digital experience.

- **Manage** your client's key information and contact details
- **Analyze** your client's past, present, and future financial life
- **Configure**, run, and share reports
- **Communicate** with your client and any other household users
- **Share** documents and statements
- **View** client specifics from third-party integrations
- **Customize** your experience based on the features you use the most

Welcome to Your Command Center

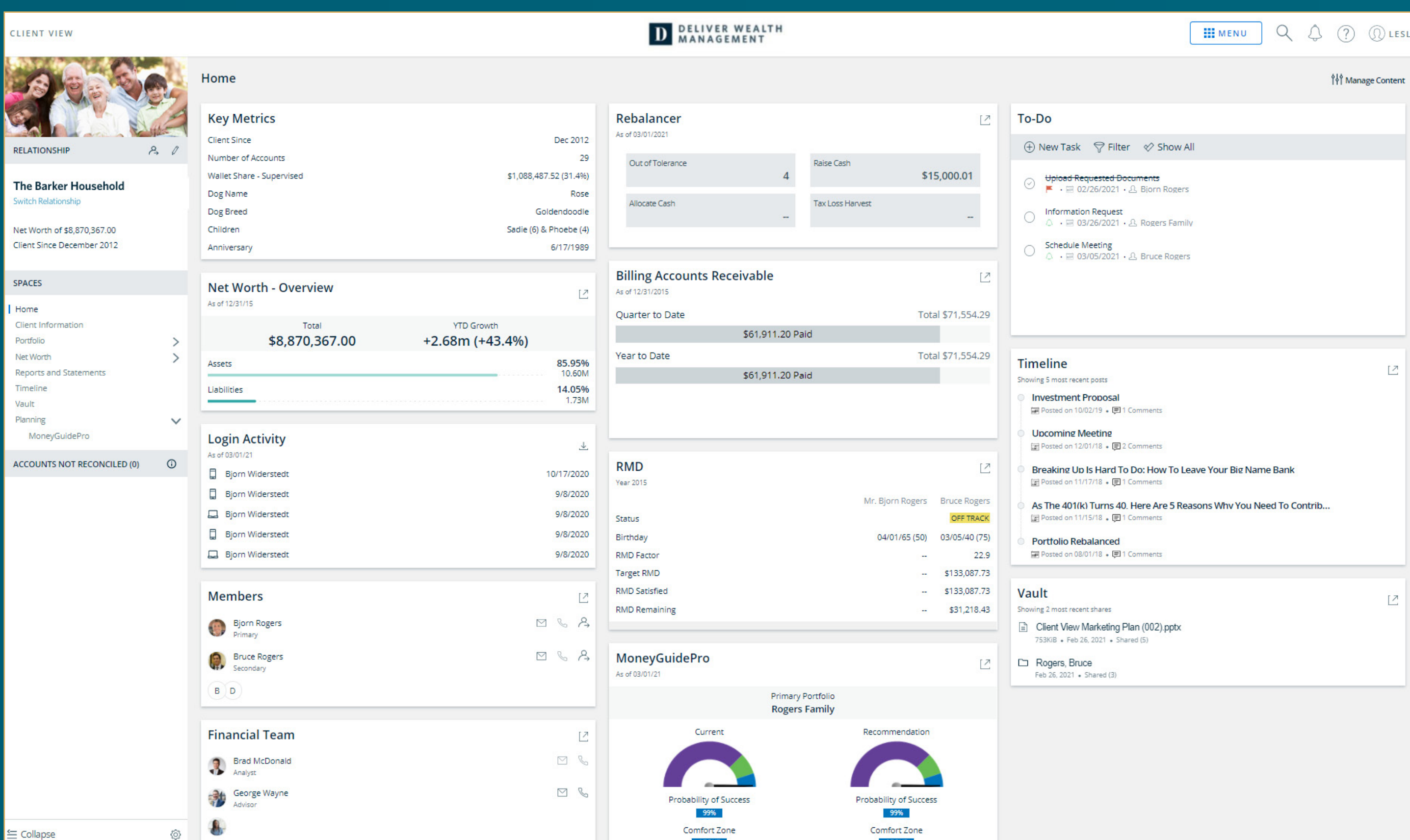
Start by viewing well-rounded relationship-centric details in a succinct and action-oriented way. A range of drag-and-drop widgets such as *Rebalancer*, *Net Worth*, *Portfolio*, and *Billing* means you can configure a *Home* experience with what's most important to you.

If you click into the widget, information turns into action by immediately connecting you to where you need to go. This means you can efficiently accomplish client-related workflows like:

— Send a *Timeline* communication to the *Client Experience* portal

— Act on a tax-loss harvesting opportunity within *Rebalancer*

— Create a new task on your client's *To-Do* list



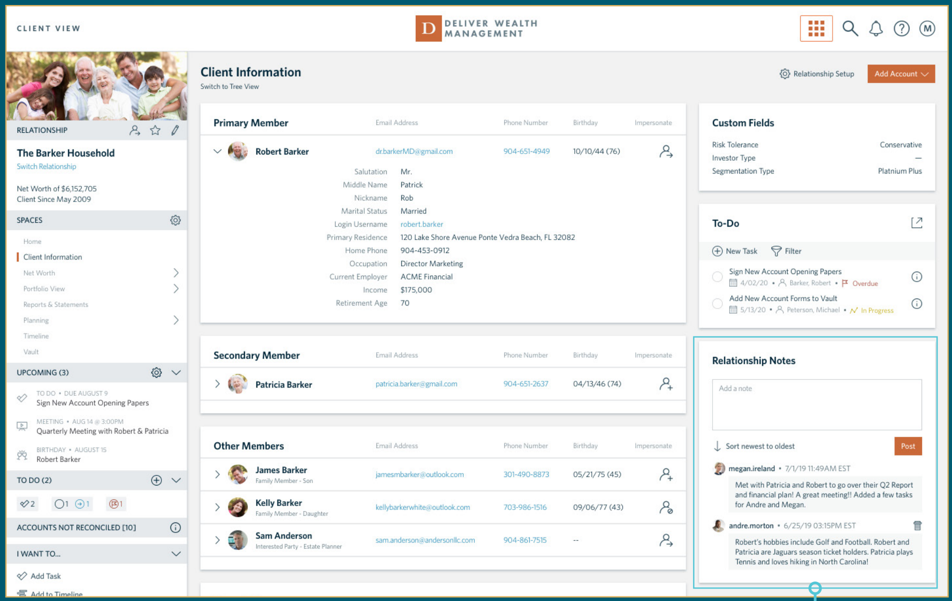
Easily review and manage all aspects of a client relationship within a single application.

View and Manage Client Information

View, manage, and update the details behind an entire household and any stakeholder contributing to their success.

Supplement your native platform data with information from key integration partners, such as your CRM or custodian partner.

Add relationship notes so you and other team members can stay on the same page and keep record of additional client information for future reference.



Leave notes about any of your client relationships for others at your firm to view.

Analyze Portfolio Metrics

View extensive portfolio accounting, reporting, and analytics tied to your client.

Arrange dynamic metric cards like performance, allocation, or activity summary in a way that makes sense to you.

For a more in-depth analysis, expand any card to see additional details. Parameters, such as date ranges, can be adjusted and the data updates in real time.

The incorporation of integration partner content, such as risk analytics, gives you seamless and complete insights.

Dynamic metric cards can be rearranged and expanded.

Build the Full Net Worth Picture

Work within a collaborative and highly configurable balance sheet to capture your client's entire wealth picture.

The design enables effortless aggregation, allows for valuation updates, and offers direct access to opening new custodial accounts.

Visualize net worth changes over time. By moving your cursor along the graph, you will see the assets, liabilities, and net worth for the selected date.

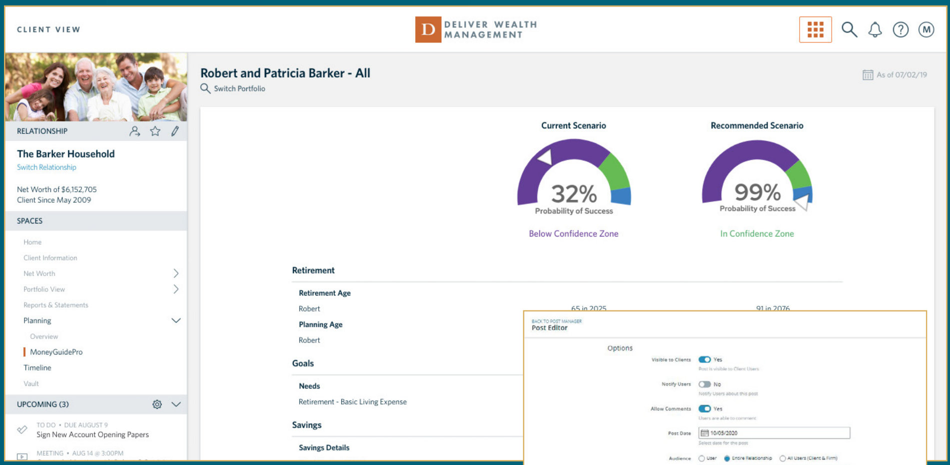
While you work on your client's balance sheet in *Client View*, your client can also make updates within their *Client Experience* portal—making it easy to determine total net worth.

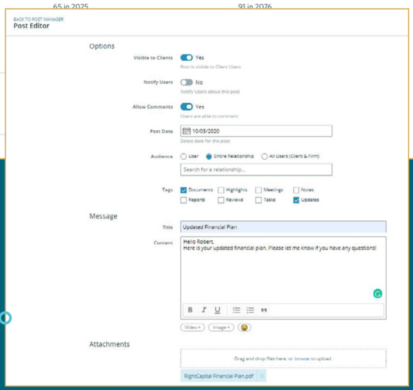
Include Long-Term Financial Plans

Incorporate detailed financial plans to strategize for your client's future within the context of their entire financial life.

You can work with an outside planning solution natively within *Client View*. Or, leverage the *Timeline* integration from others so updated plans can be sent directly to the *Client Experience* portal.

This makes it easy for you to consistently share and communicate the keys to long term success.





View and track financial plans natively within *Client View* using the MoneyGuidePro® integration.

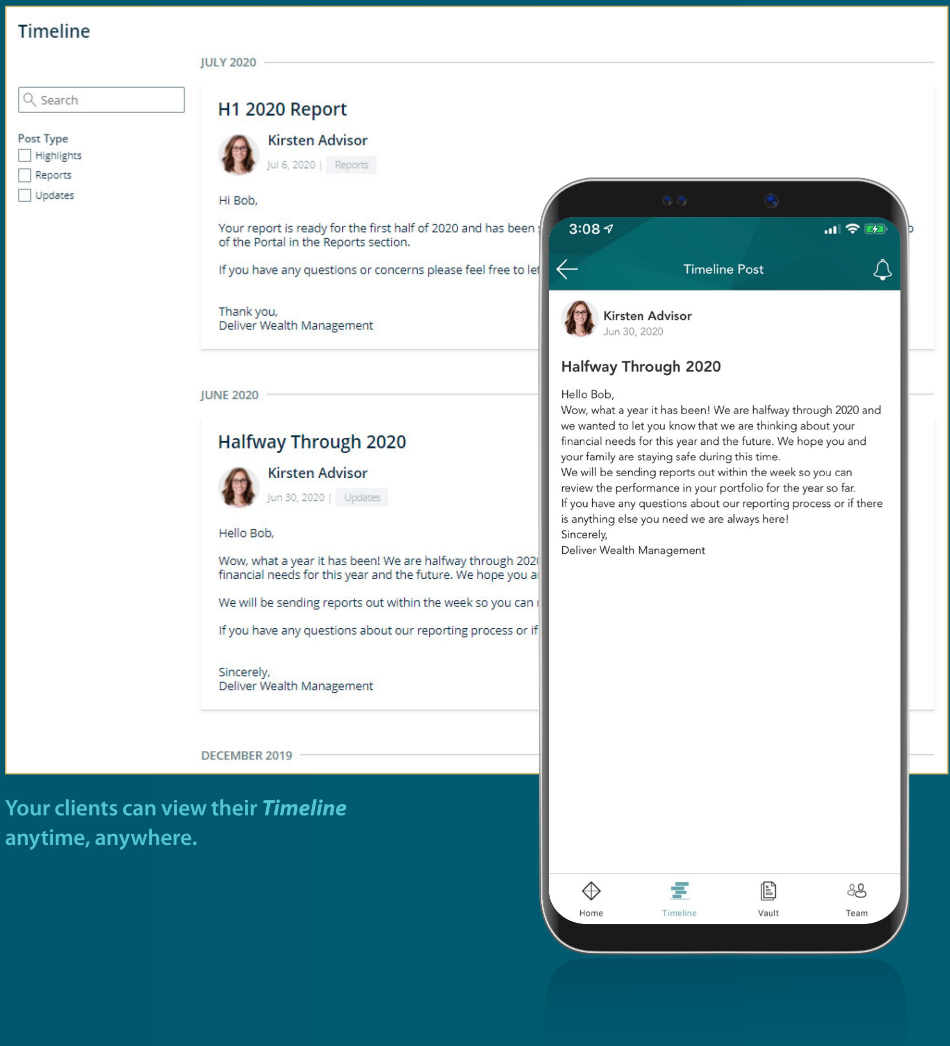
Post financial plans to your client's *Timeline* within their *Client Experience* portal directly from outside solutions like RightCapital.

Communicate on Your Client's Timeline

Posting messages on your client's *Timeline* within their *Client Experience* portal is straightforward and continuously tracked. And, immediately after you send a new message, your client receives an automatic notification on their mobile device.

Your *Timeline* space within *Client View* also keeps track of messages and comments sent to you by your client and allows you to apply filters to easily search the communication history.

Numerous third-party solutions integrate with *Timeline* so you can send messages to your client's portal no matter the tool you are working in.



Your clients can view their *Timeline* anytime, anywhere.

Manage Reports and Statements

View and download existing Black Diamond generated reports associated with your client, or, quickly run a new beautifully crafted report on the fly.

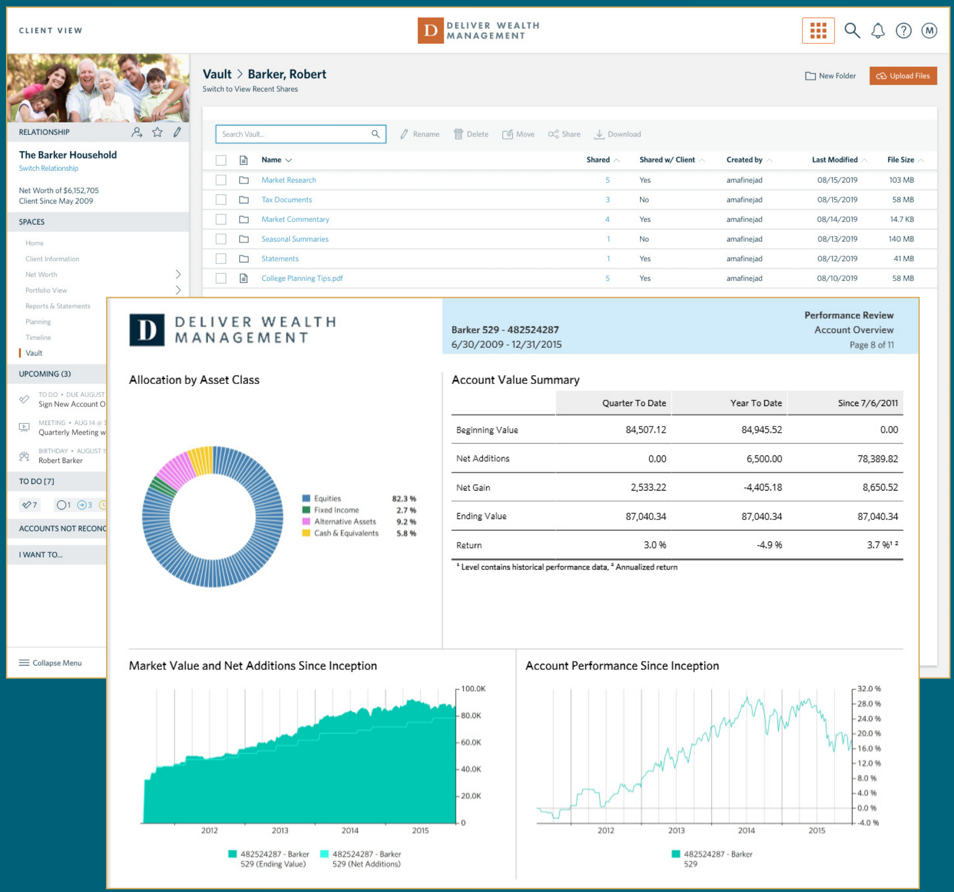
Client-related statements or tax documents imported from your custodian also live within this space.

From here, you can easily share any of these files via your client's *Vault* and optionally notify them through email or on their *Timeline*.

Oversee the Document Vault

Access and manage the *Vault* for all of your client's household members who use the *Client Experience* portal as well as the related financial team.

The ability to apply folder structures and move documents keeps things efficiently organized. Uploading and sharing new documents is seamless and you can choose to alert the applicable client to any new files.



Generate and then share beautifully crafted reports on your client's *Timeline* or within their *Vault*.

Customize the Experience

For a tailored experience, firm wide, role, or user specific settings can be configured to fit your needs. Firm administrators have the flexibility to turn on or off various features and a range of permissions to customize the *Client View* experience based on operational functions within your firm.

Designed with You in Mind

Black Diamond's comprehensive suite is leveraged by firms of all sizes to streamline operations, deliver business insights, and connect with both prospects and clients to build long-lasting relationships.

The *Client View* application centralizes all client-centric details, workflows, and third-party integrations already found within Black Diamond into a single, interconnected command center.

For More Information
To learn more about how the Black Diamond Wealth Platform can support your business and connect you with your clients, call 1-800-727-0605 or email info@advent.com. You can also visit blackdiamond.advent.com.