

PRODUCT BRIEF

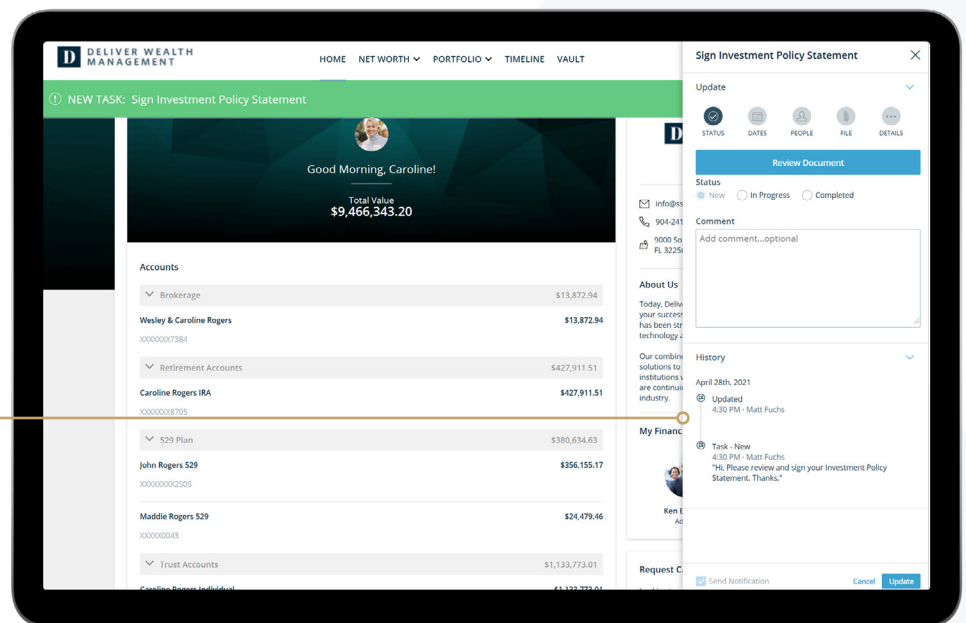
eSignatures: Seamlessly Signed and Securely Stored

As the home of your day-to-day client communication and financial management needs, the Black Diamond® Wealth Platform eases the document signing process through a smooth and effective integration with DocuSign®—the leading solution for eSignatures.

A productive, timesaving workflow.

The world of wealth management has no shortage of documents requiring client signatures and a place for safekeeping. From within Black Diamond, a simple workflow is the answer to streamlining the entire end-to-end process. The platform provides an easy way to request, track, and complete DocuSign® eSignatures along with automatic storage of the final document within Black Diamond's secure *Vault*.

The *Client Experience* portal features a **To-Do** list, which keeps track of outstanding signature requests and provides direct access for fulfillment.



How it works.

When you are ready to initiate an eSignature request, you can choose to upload the file from your computer or select a previously established DocuSign template.

After preparing a personalized message, the client receives an immediate notification via email. Additionally, you can create a *Task* on the *To-Do* list within their *Client Experience* portal. An assigned due date, periodic reminders, and direct access for the client to fulfill the request help prompt action. The *Task* will also self-mark as completed and alert you when the client meets all signature requirements.

You also have the option to select a Black Diamond *Vault* folder for automatic storage of the document after all necessary signatures are completed. This creates access and organization of signed documents along with other pertinent client-related files, like custodial tax statements and reports, so you and your client can quickly find important materials. *Vault* folders have the flexibility to be private to you or shared with your client or other team members - efficiently meeting any oversight needs.

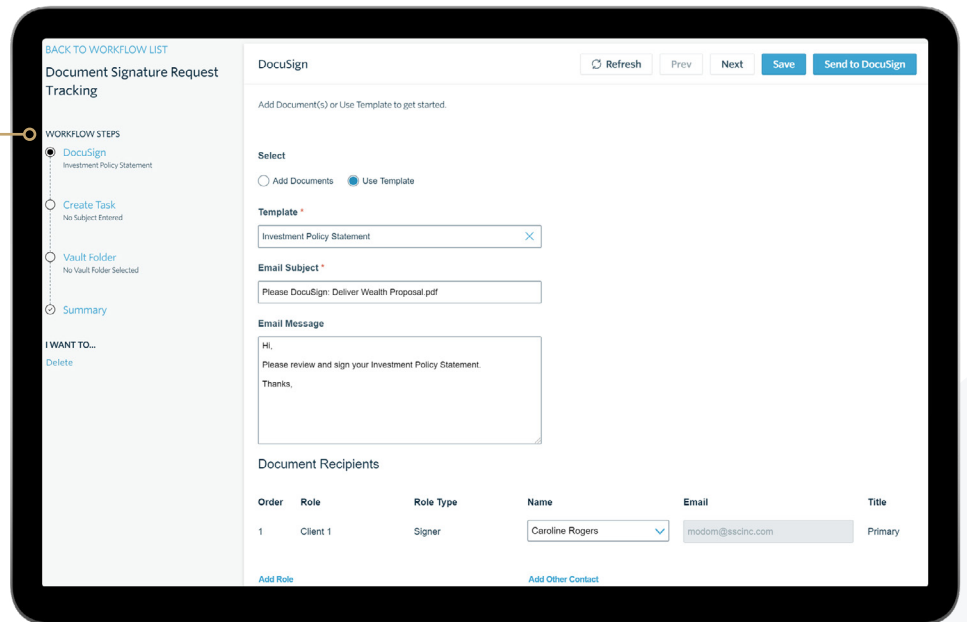
Everyone benefits.

Your clients gain:

- Visibility into outstanding signature requests within their *Client Experience* portal, no matter the device
- Immediate notification when new document signatures are requested
- Direct navigation to sign the document in DocuSign from within their *Client Experience* portal or the notification email
- Access to the final signed document within their portal's secure *Vault*

You gain:

- Quick transmission of eSignature requests to all required signees associated with a relationship



A simple Black Diamond workflow streamlines the entire end-to-end DocuSign process.

- Efficient monitoring of all outstanding *To-Do List Tasks* related to DocuSign across all clients in Black Diamond
- Notification when a client updates a *To-Do List Task* or when all signature requirements are met
- Faster responses since clients receive system reminders to take action on outstanding requests
- Access to signed documents within the secure *Vault* with the ability to share the folder with clients and other team members

performance reporting, portfolio rebalancing, an immersive client portal, communication tools, business intelligence, and so much more—all powered by fully outsourced daily reconciliation and data management services. Working as the heart of your business, Black Diamond supports productivity-enhancing integrations with third-party solutions for CRM, portfolio analytics, managed accounts, financial planning, and more. Proactive, personalized attention from a dedicated service team ensures advisors receive access to an elite combination of technology and service.

About the Black Diamond Wealth Platform.

Black Diamond is an award-winning, cloud-native solution designed to meet the complete business needs of wealth management professionals and their clients. The comprehensive platform features

FOR MORE INFORMATION

To learn more about Black Diamond and the DocuSign integration, please contact your personal service representative, call 1-800-727-0605 or email info@advent.com.

*DocuSign licensing not included as part of Black Diamond. Your firm must obtain a license directly through DocuSign.

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