

PRODUCT BRIEF

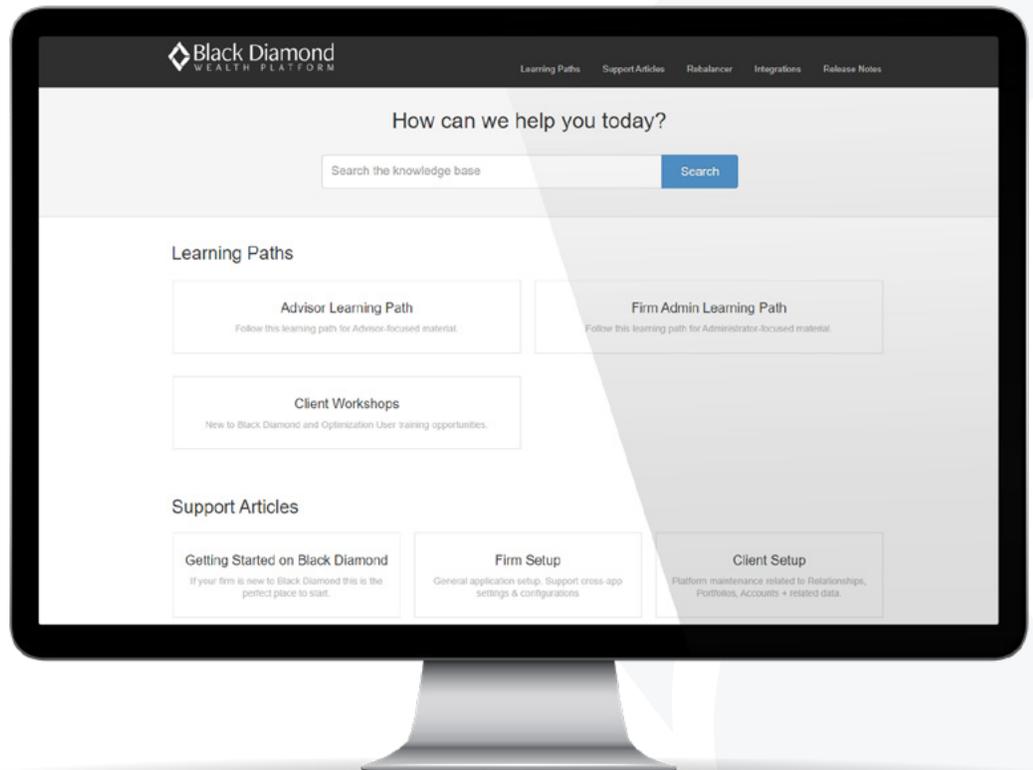
Yours is a Relationship Based Business. So is Ours.

Raising the bar with a distinct combination of industry-leading technology and best-in-class service.

With the Black Diamond® Wealth Platform, you don't just get a product. You get a solution. Through an elite combination of technology and service, your firm is empowered to make the most of Black Diamond's powerful suite of tools. With a service team of over 100 dedicated members, you receive expert assistance and gain a true technology partnership.

We take service seriously.

On day one, an expert implementation team greets you. Together, you work hand in hand to make your platform migration as smooth as possible. Data conversion, custom reports, client portal setup, and more, the team ensures you are properly configured to best meet the needs of your business.



A comprehensive knowledge base offers an extensive collection of documents and videos for any time access.

Once your operations are in place, you experience a warm transition to a full-service support team, including an introduction to your dedicated service representative. Your service representative and their supporting team get to know your business and work as an extension of your back office. Available via phone, email, or through Black Diamond's native *Case Management* functionality, you are always connected.

High-tech meets high-touch.

The seamlessly integrated *Case Management* tool enables you to submit a secure support request directly to your service representative at your point of need. From there, you experience true transparency through prompt status updates and direct communication with your service representative and their supporting team. No matter if you need data research, custom reports or anything in between—you get personalized support when you need it.

Optimizing your use of the platform.

To help make advisor adoption simple and true scalability attainable, many resources are available so you can maximize your use of the platform.

Virtual Workshops: An ongoing series of live online workshops cover various platform topics and are designed for different levels of expertise. You can get hands-on with curriculum covering workflows, the latest platform enhancements, and best practices.

Training: A robust, two-day workshop in our Jacksonville office* allows you to dive deep into the system, meet one-on-one with your firm's service representative, and network with your industry peers. We'll even credit you to attend!

Online Learn Articles: If you are looking for instant answers, the platform is equipped with a *Contextual Support* tool that delivers relevant educational articles specific to the area of

The screenshot displays the 'Case Management' interface. At the top, there's a 'View All Firm Cases' button and a 'New Case' button. Below is a search bar for 'Search case #, submitter or subject'. A status summary shows: NEW (2), WORKING (1), REVIEW (0), and CLOSED (9). There's a 'Show High Priority Only' checkbox. A table lists cases with columns for 'Subject/Submitter' and 'Last Updated'. Two cases are shown: 'Account Recon Request' and 'General Inquiry', both submitted by 'Joey Marchy'. Below the table is a pagination control showing 'Items per page: 10' and 'Page 1'. The right side of the interface shows details for the selected 'Account Recon Request' case, including its ID (#4703157), submitter, and submission time. A text area contains the case description: 'I need support with an account. I can safely type the account number into case management because it is more secure than email.' Below this is a 'File Attachments' section with a drag-and-drop area and two PDF files attached: 'ACD Authorization -JPM Bank - Final.pdf' and 'ACD Authorization -JPM Clearing - Final.pdf'. A 'Case Team' section lists 'Joey Marchy' and 'Adam Anker'. On the far right, a 'Comments' section shows a comment from 'Sarah A.' asking for information regarding Morgan Clearing requests.

Keep track of all support requests through the built-in *Case Management* tool.

platform you are operating. Additionally, you can click into the comprehensive knowledge base and search for any topic desired. Details on all platform functionality as well as enhancement release specifics, recorded webinars, integration information, and many more resources are all available on-demand.

Your voice matters.

As a technology-enabled service organization, your input makes a difference. By voicing your ideas and feedback the enhancement roadmap evolves to meet your needs and to stay ahead of market trends.

Client Satisfaction Survey: Each year, you receive a request to provide your candid opinion on Black Diamond's service and technology. A team then analyzes all of the responses and communicates trends across the Black Diamond organization to drive change.

Great Ideas: From within the platform, you can submit enhancement requests through a *Great Ideas* feature. These ideas go directly to the product development team who track themes and make improvements directly in response to the submitted suggestions. The team places a lot of focus on these enhancement requests and over 365 individual *Great Ideas* were implemented last year.

FOR MORE INFORMATION

The unlimited, proactive, and high-touch Black Diamond service model breaks the mold and stands out as a key differentiator.

If you would like to learn how the Black Diamond Wealth Platform can support your business, call 1-800-727-0605 or [email info@advent.com](mailto:info@advent.com). You can also visit blackdiamond.advent.com

*Subject to office reopening.