

## Black Diamond + Redtail CRM:

# A Cohesive Experience

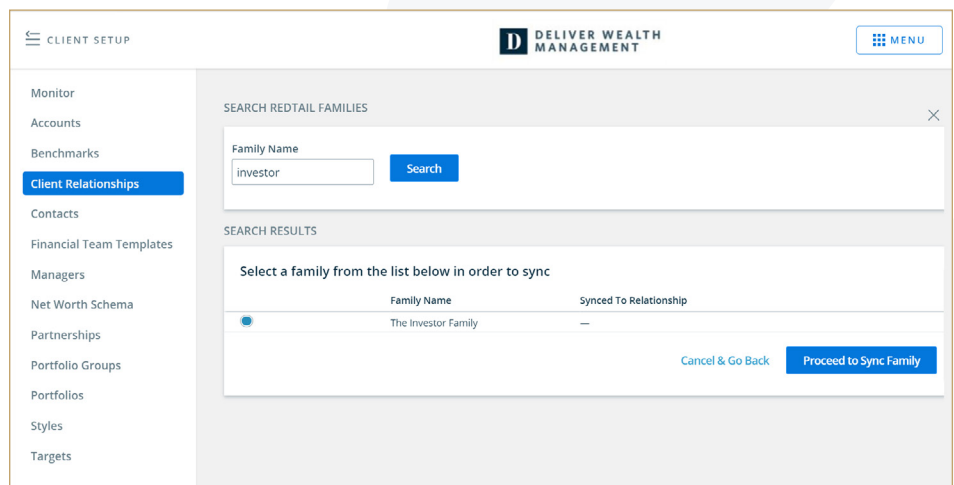
**Delivering a seamless client onboarding and management experience that saves you time by eliminating manual and duplicative work.**

Your clients are the most important aspect of your business. Which is why the Black Diamond® Wealth Platform and Redtail CRM work together to help you easily connect with your clients. By leveraging this integration, you gain client data integrity and transparency as well as easy navigation for streamlined workflows.

### Sync your Redtail CRM household data with Black Diamond.

Effortlessly upload and keep client details such as addresses, phone numbers, birth dates, and account ownership structure up to date within Black Diamond. This way you can power impressive platform functionality within the *Client Experience* portal, gain insights through the *Business Intelligence* application, use the client command center, *Client View*, and so much more.

With just a couple of clicks, you can either bulk or ad-hoc import new families from Redtail CRM and a Black Diamond relationship will be created automatically with all the underlying contacts and details. You can also link any existing contacts already in both systems so any changes you make within Redtail CRM are reflected within Black Diamond.



CLIENT SETUP

DELIVER WEALTH MANAGEMENT

MENU

Monitor

Accounts

Benchmarks

**Client Relationships**

Contacts

Financial Team Templates

Managers

Net Worth Schema

Partnerships

Portfolio Groups

Portfolios

Styles

Targets

SEARCH REDTAIL FAMILIES

Family Name

investor

Search

SEARCH RESULTS

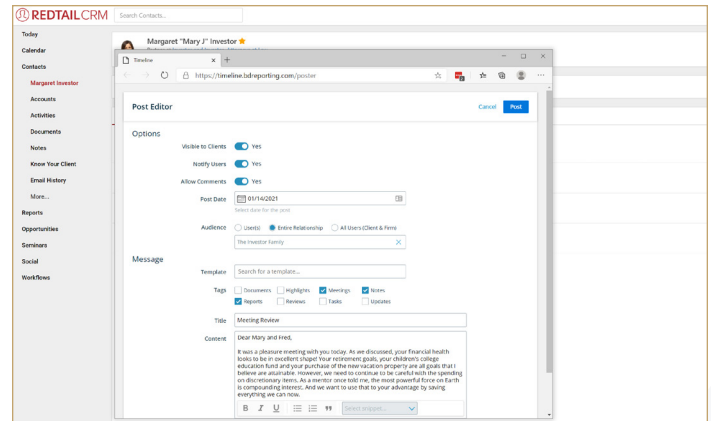
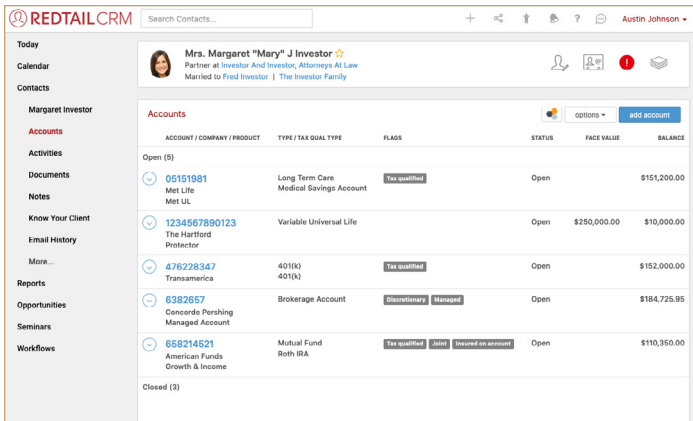
Select a family from the list below in order to sync

Family Name	Synced To Relationship
<input checked="" type="radio"/> The Investor Family	—

Cancel & Go Back

Proceed to Sync Family

**Easily create Black Diamond client relationships using your Redtail CRM data.**



Account data from Black Diamond syncs into Redtail CRM so you can understand your client's investments without leaving the system.

Create personalized messages from within Redtail CRM that automatically post to your client's *Timeline* within their *Client Experience* portal.

### View your client's reconciled Black Diamond account data in Redtail CRM.

Within your client's Redtail CRM record, you can see their reconciled portfolios, accounts, and holdings. This way you gain a holistic perspective of your client's investments without navigating away from the CRM.

### Communicate on your client's *Timeline* directly from Redtail CRM.

Memorialize financial successes, document meeting notes, send birthday wishes, and more. From within Redtail CRM you can post on your client's *Timeline* within their Black Diamond *Client Experience* portal and they will receive an immediate notification on their mobile device.

### Navigate between both systems seamlessly through single-sign-on.

Sign into Black Diamond from Redtail CRM, and from Redtail CRM into Black Diamond, with a click of a button. The bi-directional single sign on eliminates the need for manual password entry with each login, and allows for tremendous time savings when switching between systems.

### About Redtail Technology

Founded in 2003, Redtail Technology is a leading provider of web-based Client Relationship Management (CRM), compliant text messaging solutions, paperless office, and email archiving solutions in the financial services industry. The company is dedicated to helping advisors efficiently grow their firms by providing them with the core technologies that drive their day-to-day operations, offering low cost and easy to implement applications and integrating with many of the industry's most widely used applications. As a pioneer in the financial technology industry, Redtail is committed to providing advisors exceptional customer service and strives to contribute in meaningful ways to its local communities in California, Arizona, and Georgia.

### About the Black Diamond Wealth Platform

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

### FOR MORE INFORMATION

To learn more about how Black Diamond and Redtail CRM work together, please contact your personal service representative, call 1-800-727-0605, or email [info@advent.com](mailto:info@advent.com). You can also visit [blackdiamond.advent.com](http://blackdiamond.advent.com) or [redtailtechnology.com](http://redtailtechnology.com).