Black Diamond
WEALTH PLATFORM

Revolutionizing the Wealth Management Experience

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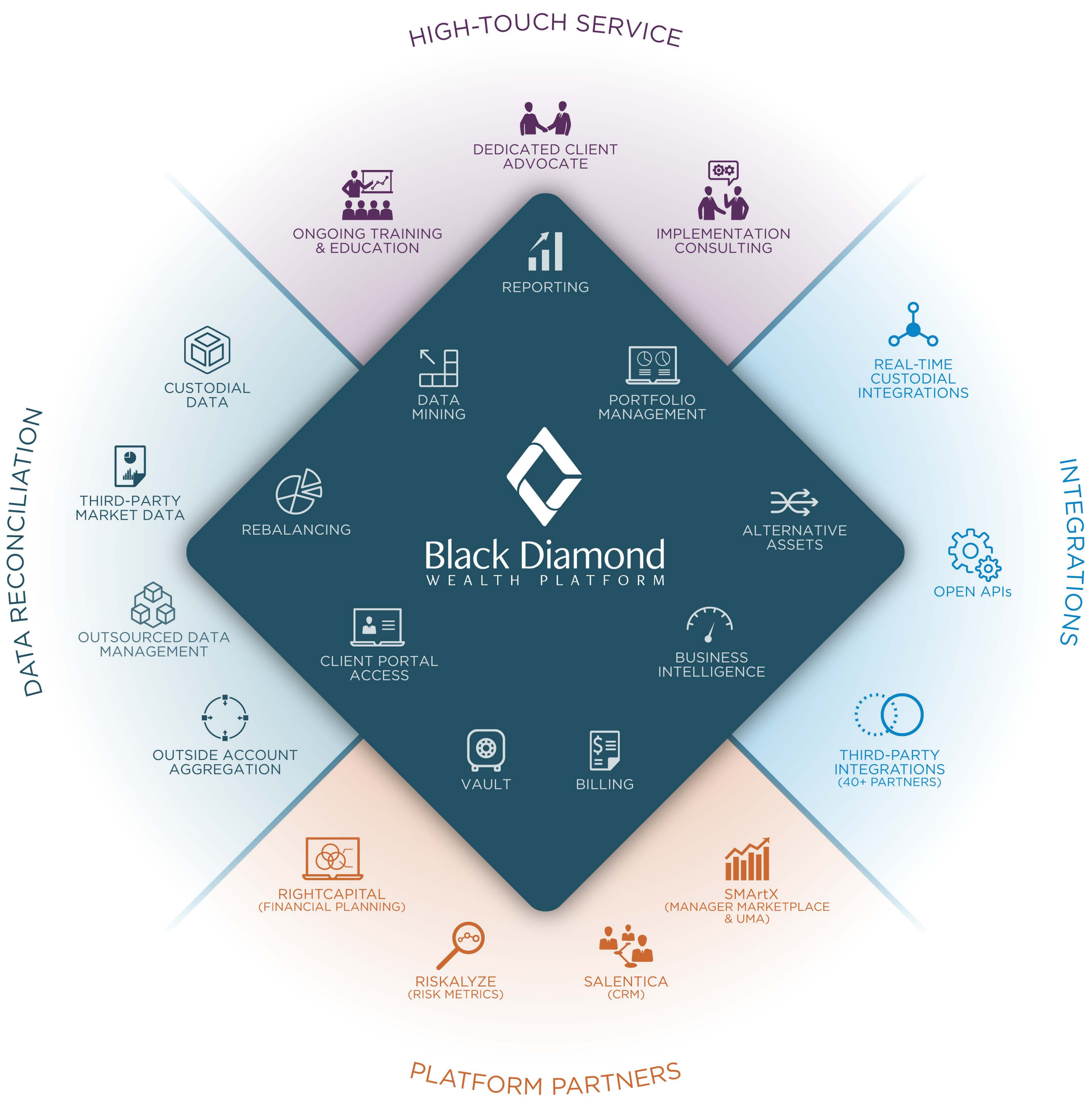
Advisors using Black Diamond's integrated suite can confidently tell their story and customize each conversation to fit each client's needs. Data, whether from our system or an outside provider's, is at the heart of these conversations. Our data is accurate and dynamic. We make sure we get it right so you can focus on what matters—your clients and your business.



By providing a powerful, end-to-end technology stack, we aim to deliver a unified experience and minimize cost to service.

Black Diamond is revolutionizing the wealth management experience with innovative, cloud-based tools that strengthen connections with clients and prospects. We are a team of advocates for your business with deep industry knowledge and a dedication to serving your firm.

With Black Diamond, advisors gain

- A partner who is looking out for you and ahead at industry changes
- Innovative, cloud-based tools that strengthen connections with clients and prospects
- Best-in-class, reliable clean data that fuels client-ready dynamic reports
- Built-in integration options
- Dedicated, single point of contact service model

We deliver cutting-edge solutions that drive your success

- Portfolio management
- Reporting
- Client portal
- Rebalancing
- Firm/advisor dashboards
- Compliance tools
- Extensive integrations
- Billing
- And more

Distinct configuration

Designed to reflect your firm's unique data access and presentation preferences, Black Diamond allows you to view and present investment strategy and portfolio performance in ways consistent with both your needs and the needs of your clients.

Interactive client relationship

The Black Diamond Client Experience allows you to provide your clients a custom-branded and interactive online environment that can be accessed anytime, anywhere, on any device. The dynamic client portal allows your investors to securely share documents with you, track performance, access planning and goal information, quickly schedule meetings and more. Through the Relationship Timeline, your clients can easily visualize key interactions and decisions made throughout your partnership, which syncs directly from your CRM. By leveraging this portal, you will elevate the reporting and client communication experience—strengthening you advisor-client relationship.

Robust client reporting

Through Report Builder functionality, the process of generating reports is accessible and flexible allowing you to build new reports from scratch or make on-demand changes to existing reports. You can present portfolio and performance data to clients with powerful graphical formats in a personalized and effective way. By leveraging these tools and focusing conversations on what really matters to each client, you'll demonstrate how you're helping them reach their goals.

Powerful trade rebalancing

The open layout, intuitive workflows and robust modeling framework of our next-generation Rebalancer goes beyond standard expectations to support the most sophisticated structures and strategies. Proactive monitoring, tax-efficient rebalancing, enhanced modeling, straight-through trade processing via FIX connectivity are just some of the key features.

Focused business insights

Take the pulse on your overall business performance via the Business Intelligence dashboard. Designed to demonstrate the growth of your business, the system showcases four key metrics: Assets under Management, Revenue (Management Fees), Client Relationships and Net Flows over time. A firm manager or individual advisor can quickly identify the current standing of the business, look for trends and outliers, and examine the details of client relationships.

Unlimited service model

Black Diamond is not just a tech provider, we're actually a technology enabled service organization. That's why we provide a high-touch customer service experience. As a client, you have access to a complete service team that feels like an extension of your back office. Led by your dedicated Client Advocate, your team is available to assist you with such things as data research, custodial data intake, data reconciliation and issue resolution.

Revolutionizing the Wealth Management Experience

Strategic partnerships

Our extensive integration network enriches the Black Diamond experience. By leveraging a platform of components, you benefit from seamless access to your preferred solutions. Our partnership with featured solutions for CRM, risk analysis, managed accounts and financial planning does not limit your choices, but provides an opportunity to utilize the best integrated experience available.

riskalyze	**Riskalyze** Capture a quantitative measurement of client risk tolerance so advisors can discuss a client's current risk levels vs. how much risk they may need to take to reach their personal goals.
SS&C | Salentica	**Salentica Elements** Easily manage all of your client relationship information including client profiles, activities, and communications.
SMArtX	**SMArtX** Leverage a single interface to manage traditional and alternative investment strategies though a UMA/SMA structure.
RIGHTCAPITAL	**RightCapital** Accomplish more financial planning in less time. The drag and drop, plug and play functionality makes it easy to get started while enabling an interactive advisor and client experience.

The Black Diamond difference

Today, we are the platform of choice for over 1,400 advisory firms. We measure ourselves on your success and look to you to help drive our product design and innovation roadmap.

For more information

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**. You can also visit **blackdiamond.advent.com**.

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