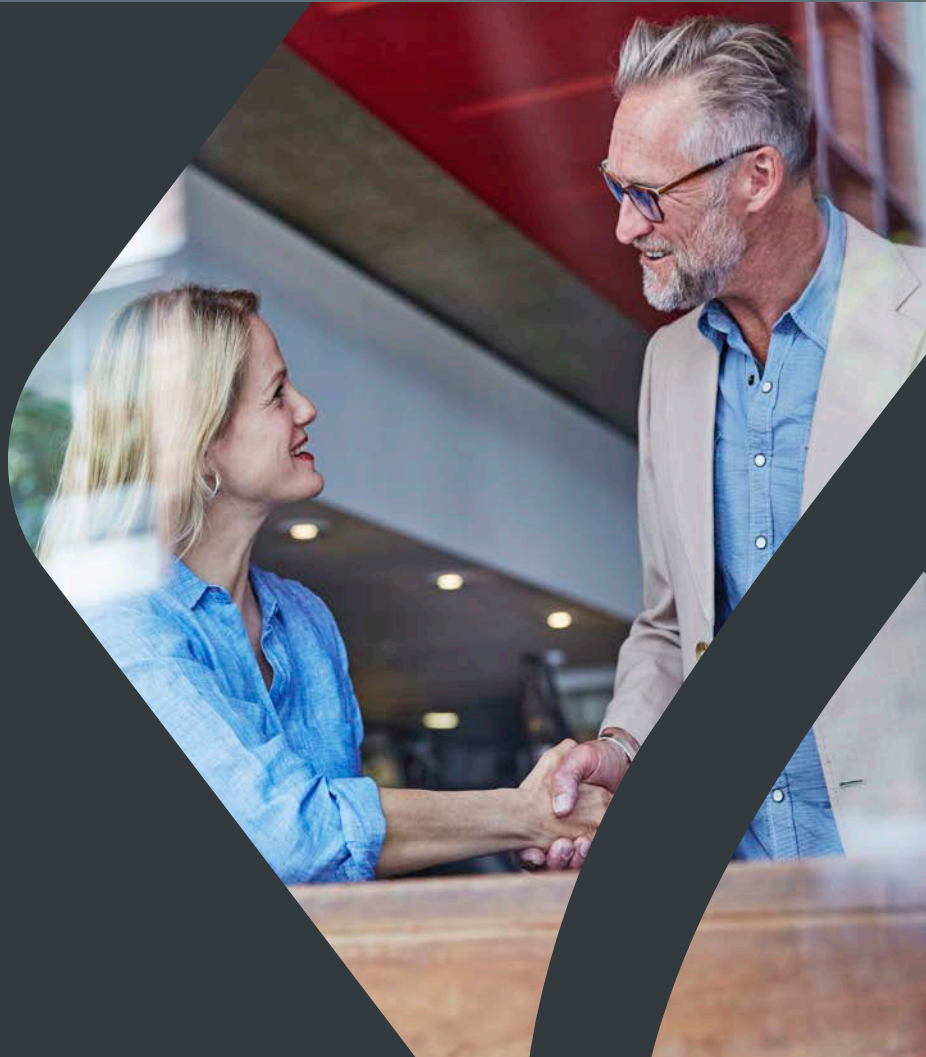
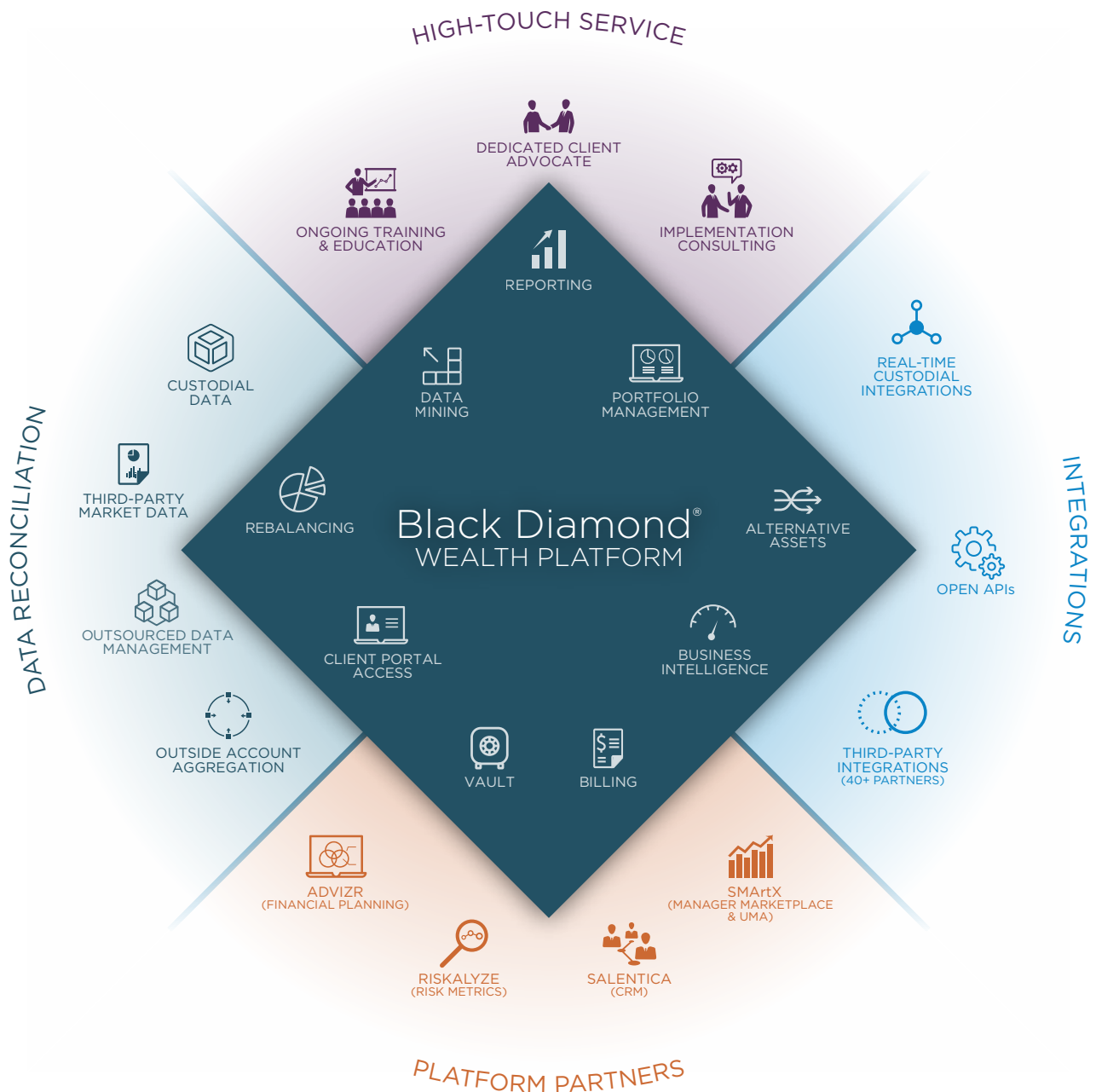


Revolutionizing the
Wealth Management
Experience



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.



Manage your client's complete wealth picture with our purposeful suite of tools and best-of-breed integrations.

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
- Extensive integration
- 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

By using our integrated suite, you can confidently tell your story and customize each conversation. Highly configurable content allows you to reach your clients at their point of need—anytime, anywhere—with portfolio information optimized for smartphone, tablet or desktop viewing. Easy-to-use reports and 24x7 transparency easily demonstrate your value to prospects and strengthen your existing client relationships.

Powerful client reporting

With Black Diamond 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 to reach their goals through their portfolios and life plans.

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.

Revolutionizing the Wealth Management Experience



Strategic partnerships

Our extensive integrations enrich the Black Diamond experience. We do what we do best, then integrate with best-of-breed partner solutions for financial planning, CRM, and proposal generation to provide you with custom solution packages to fit your specific needs. Empowering you to deliver value and advice to your clients, our featured partners include:

	Advizr Easily access Black Diamond data and sit side-by-side with clients to create a complete financial plan in minutes—even tweak plans in real-time.
	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.
	Salentica Elements Easily manage all of your client relationship information including client profiles, activities, and communications.
	SMArtX Leverage a single interface to manage traditional and alternative investment strategies through a UMA/SMA structure.

The Black Diamond difference

Today, we are the platform of choice for over 1,200 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 have questions about this paper, or 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**.