Black Diamond
WEALTH PLATFORM

A Complete Platform Enhanced by Our Partners

The Complete Wealth Picture

FINANCIAL PLANNING

RIGHTCAPITAL

CRM

SS&C | Salentica

PORTFOLIO RISK ANALYSIS

riskalyze

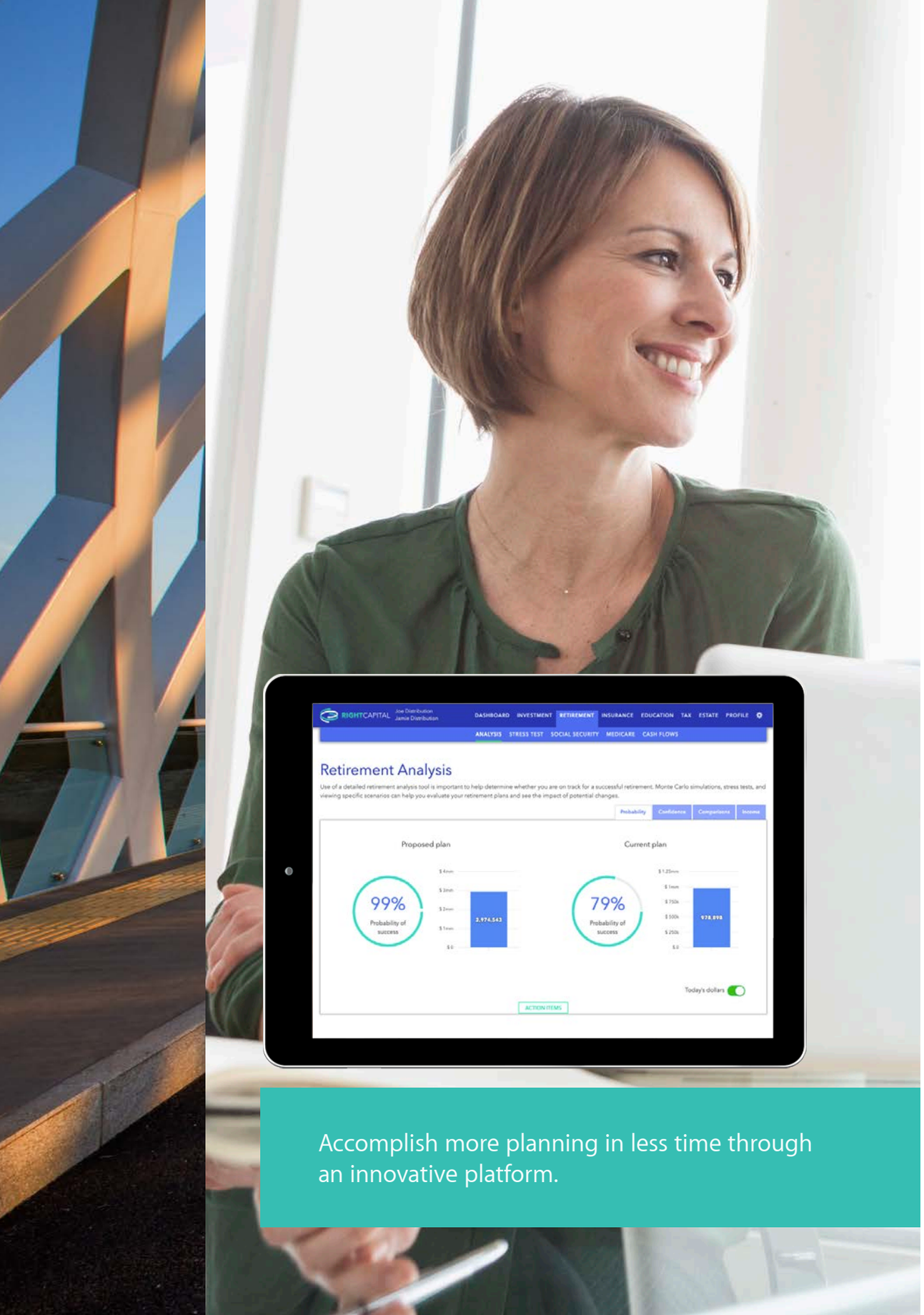
MANAGED ACCOUNTS

SMArtX

Together with our Partners, the Black Diamond® Wealth Platform enriches the overall investor experience by helping you to save time, manage relationships, and attract new clients.

At Black Diamond we do what we do best, then integrate with best-of-breed partner solutions to provide financial advisors a purposeful suite of tools to manage their clients' complete wealth picture.

Through this comprehensive solution, advisors benefit from streamlined workflows, integrated content and a unified experience: all with a single dedicated service team for ongoing support.



Accomplish more planning in less time through an innovative platform.

Financial Planning

RightCapital enables you to simplify the planning process and differentiate your services

RightCapital is a next generation financial planning software that allows advisors to do more planning in less time with its innovative features. The drag and drop, plug and play functionality makes it easy to get started while enabling an interactive advisor and client experience. With sophisticated projections, within an intuitive operating system, you will differentiate your value by simplifying the financial planning experience for your clients.

Through the digitized client onboarding, you can create your client's initial financial plan in as little as 10 minutes. A powerful and robust calculation engine generates results quickly and accurately, providing confidence and flexibility for advisors. Tax, retirement, Medicare, budgeting and more, the multi-generational platform delivers projections that help clients plan for different contingencies.

RIGHTCAPITAL

The perks of partnership

This integration redefines the planning experience by saving time and enables a more synchronized user experience. With Black Diamond data within RightCapital, you will have extensive portfolio and account data to power comprehensive financial plans.

With RightCapital and Black Diamond, advisors benefit from:

- The ability to create a comprehensive financial plan in minutes with client account and holding data uploaded into RightCapital
- Advanced tax planning capabilities, such as Roth IRA conversion and tax efficient retirement distribution strategy thanks to the automatic import of cost basis of holdings
- A real-time update of a client's financial plans since holding and pricing information is automatically updated daily

Collaboration

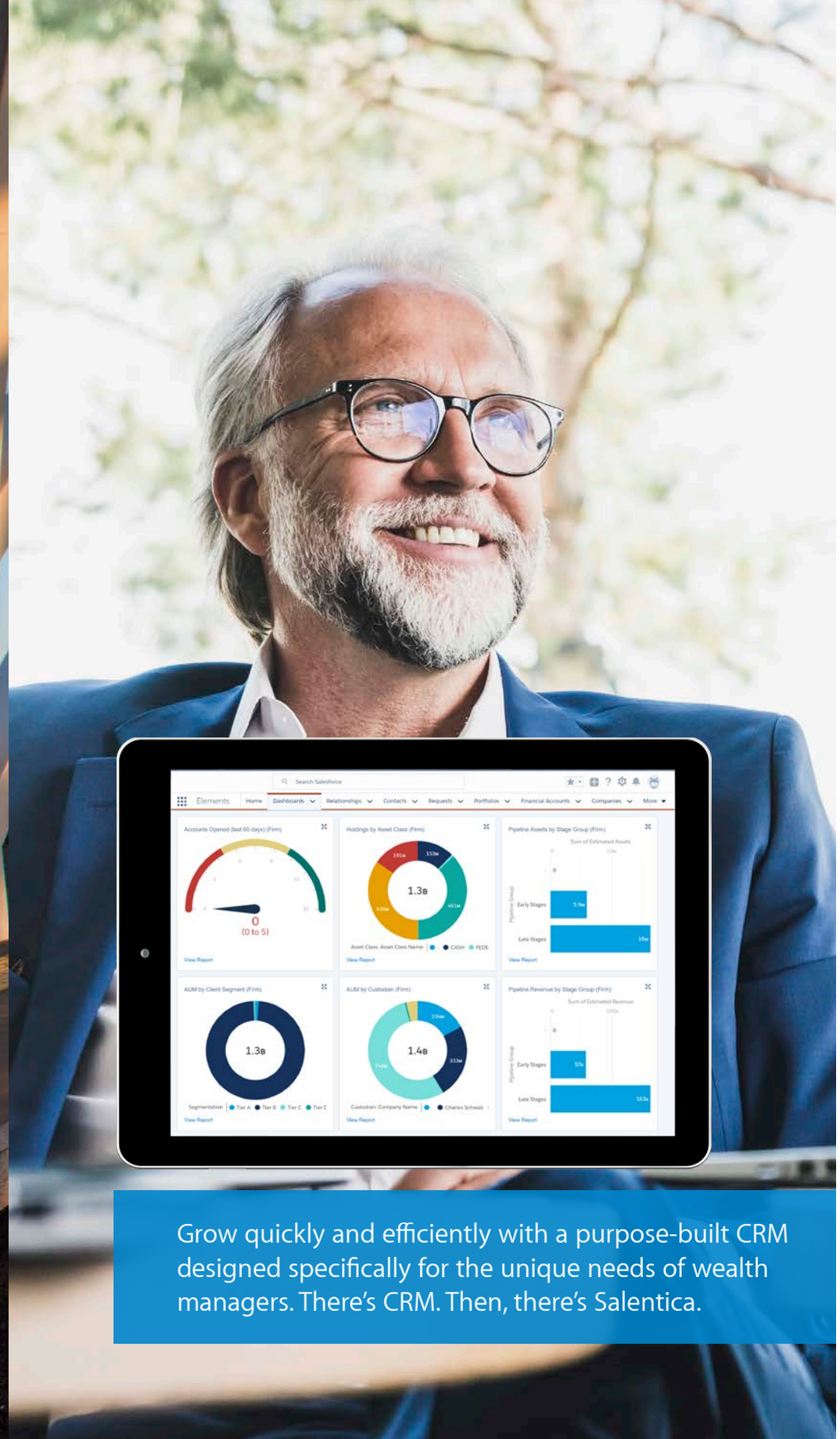
Compare multiple scenarios and illustrate stress tests through interactive tools.

Dynamic Planning

Show sophisticated projections and make adjustments on the fly.

Simplicity

Present a plan that your clients can actually understand.



Grow quickly and efficiently with a purpose-built CRM designed specifically for the unique needs of wealth managers. There's CRM. Then, there's Salentica.

Client Relationship Management

Salentica Elements empowers you to effectively and efficiently manage client relationships

Salentica Elements is designed for the unique needs of RIAs and wealth managers to deepen client relationships and grow their business using automation. Built on Salesforce Lightning, Elements eliminates the need to build and maintain a custom CRM solution by delivering a cost-effective, turnkey system centered on industry best practices.

With the native integration, advisors can access Black Diamond's powerful reporting tools right inside Salentica Elements so they can seamlessly manage and understand the intricacies of each client relationship. Since data is securely stored in the cloud, advisors can access and edit client information anytime, anywhere. Complete with industry-specific entities like relationships, portfolios and financial accounts, advisors will be better equipped to understand client needs, identify new opportunities, and address problems faster.

SS&C | Salentica

The perks of partnership

By leveraging the built-in integration, advisors are easily able to initiate, track, and analyze client engagement. Routine tasks like preparing for client meetings or assigning tasks can be automated and business process automation can be designed in order to digitize more complex workflows.

With Salentica Elements and Black Diamond, advisors can:

- Manage all client relationships including client profiles, activities, and communications
- Streamline support by having a single point-of contact for both platforms
- View recent reports along with daily account data, including holdings, asset allocation, market value, and cost basis, on a scheduled or ad hoc basis
- See aggregated AUM value at the account, portfolio, and household levels
- View, filter, and report on the prior day's holdings directly inside the CRM
- Leverage the power of integrated Elements tools such as Conga Orchestrate's workflow engine to elevate your notification needs for accounts and new business
- Use prebuilt integrations with custodians to provide real-time, secure account data

Tailor-Made Solution

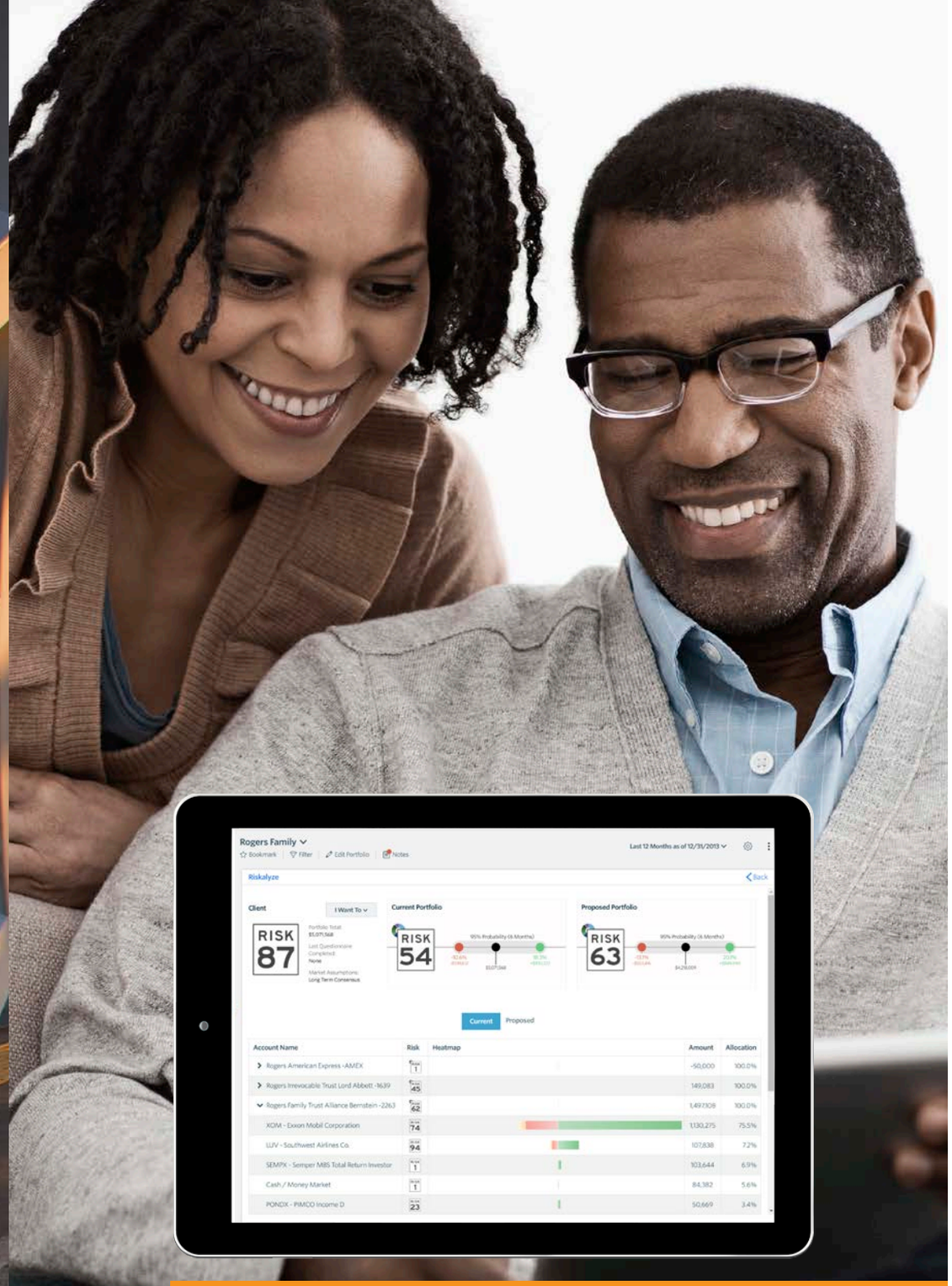
Offers advisor-friendly terms, custodial integrations, and visual workflow automation.

Two-Way Integration

Create clients, relationships and portfolios within Black Diamond using Salentica data.

Centralized Knowledgebase

Provides detailed records for each client relationship accessible via any mobile device connected to the internet.



Set clear expectations with investors by objectively and quantitatively pinpointing portfolio risk.

Portfolio Risk Analysis

Riskalyze aligns the conversation so risk makes sense to both you and your clients

Market fluctuations can result in emotional decision-making. To counteract this, Riskalyze invented the Risk Number®, which powers its risk Alignment Platform. The Risk Number is an objective, mathematical approach that removes subjectivity by quantifying an investor's portfolio risk. Financial advisors can use the Risk Number to drive conversations around how much risk investors can handle over the short term in order to meet long-term objectives.

Thanks to the native integration, advisors can use Riskalyze's powerful risk alignment tools right inside of Black Diamond which allows them to effortlessly incorporate risk into their clients' complete wealth picture.

riskalyze

The perks of partnership

Advisors can use Riskalyze to accurately determine a client's risk tolerance level, then assess the client's current portfolio risk against their Risk Number. Our teams' collaboration on building a unified experience makes it easy for advisors to quickly incorporate the risk component into client meetings and discussions.

With Riskalyze and Black Diamond, advisors can:

- Consolidate their technology into one centralized, integrated solution
- Enhance client dialogue by incorporating Riskalyze content into presentations and the Client Experience portal
- Monitor risk within client portfolios on a daily basis as part of the overall client dashboard
- Stay compliant by documenting an assessment and portfolio risk of a client
- Propose new portfolios to clients based on risk alignment goals
- Streamline support by having a single point-of contact for both platforms

Proactive Monitoring

Track risk within client portfolios on a daily basis as part of the overall client dashboard.

Deep Integration

Incorporate risk numbers, probability charts, and risk/reward heatmaps into Black Diamond.

Stress Tests

Stress test portfolios for a variety of stock and bond market scenarios.

Save time and scale by managing traditional, alternative and index strategies in one account.

Managed Accounts

SMArtX is the next evolution in managed accounts

As firms increase their reliance on technology to support the evolving relationship between advisors and investors, SMArtX delivers an integrated technology solution to drive productivity gains, grow independent channels, and facilitate the transition from commission-based to fee-based accounts. SMArtX is a complete turnkey asset management platform that offers advisors unparalleled portfolio flexibility and customizable investment solutions to meet each investor's objective.

Custodian-agnostic, SMArtX provides multi-custodial solutions across major institutions. The platform provides advisors access to traditional and alternative investment strategies as well as the ability to implement 3rd party and/or proprietary investment strategies through a Unified Managed Account (UMA). This gives investors access to multiple investment strategies with the benefits of a UMA/SMA structure. It's the first UMA/SMA platform providing advisors access to institutional quality managers across both traditional and alternative investment strategies, as well as individual securities, mutual funds, and ETFs, in a single brokerage account.

The perks of partnership

Our partnership makes it easier for financial advisors to utilize the power from both tools all in a single wealth platform. By leveraging Black Diamond reporting partnered with SMArtX's extensive platform, the combined solution delivers a managed account experience like no other.

With SMArtX and Black Diamond, advisors can:

- Access SMArtX directly from their main Black Diamond dashboard
- Gain access to hundreds of investment managers and strategies
- Benefit from a complete investment ecosystem with SMArtX data seamlessly integrated into Black Diamond
- Generate Black Diamond reports showing sleeve-level data from SMArtX
- Save money since Black Diamond fees are waived for assets on SMArtX

SMArtX

Manager Marketplace

Access hundreds of 3rd party investment strategies from top managers.

UMA/SMA Platform

Deliver customized multi-strategy portfolios to clients in a UMA/SMA structure.

Deep Integration

Produce sleeve-level reporting in Black Diamond.

Bundled Solution

Save money since fees are waived for all assets on SMArtX.

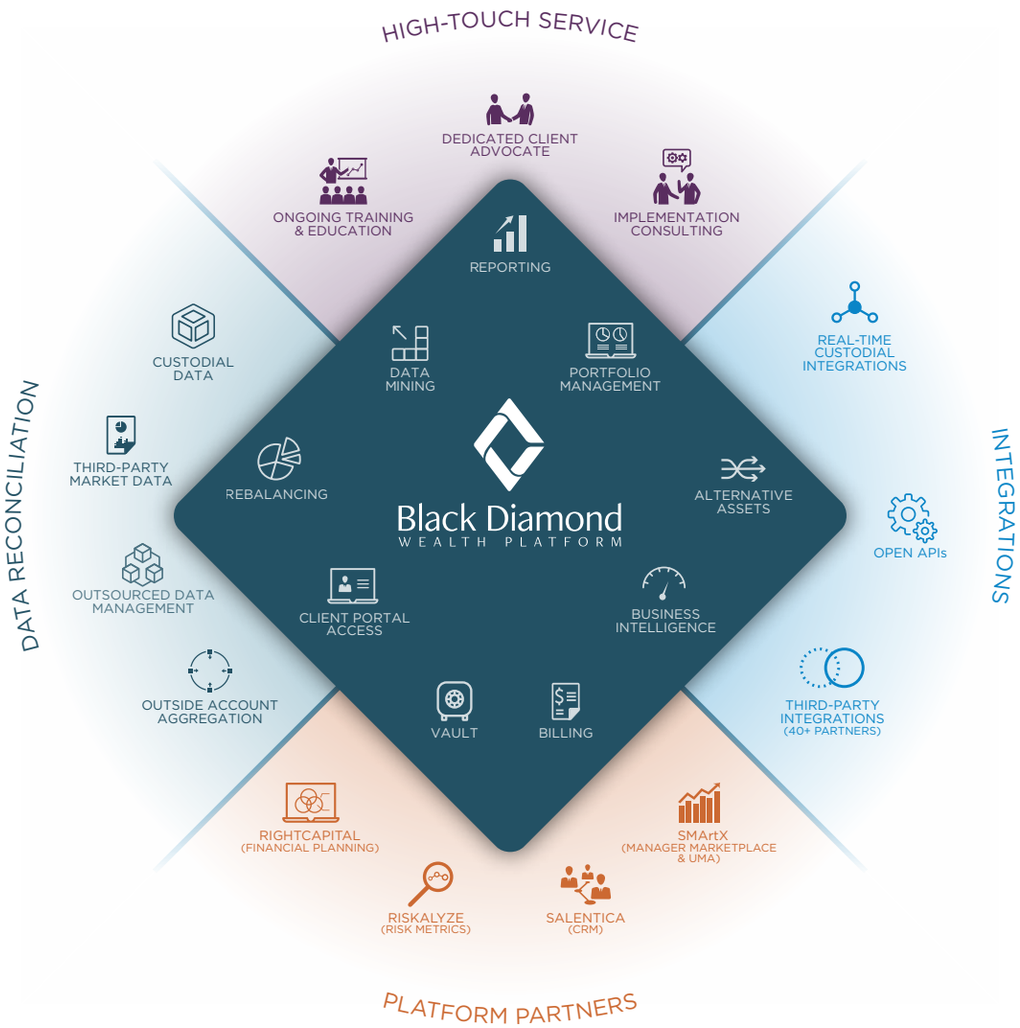
The Choice is Yours

Because entrepreneurial advisors want the flexibility to choose, Black Diamond offers an extensive integration network with over 45 partners as well as 900+ custodial integrations.

Our partnership with the featured solutions does not limit your choices, but provides an opportunity to utilize the best integrated experience available. By leveraging a platform of components within Black Diamond, you benefit from seamless access to your preferred solutions all within one unified platform.

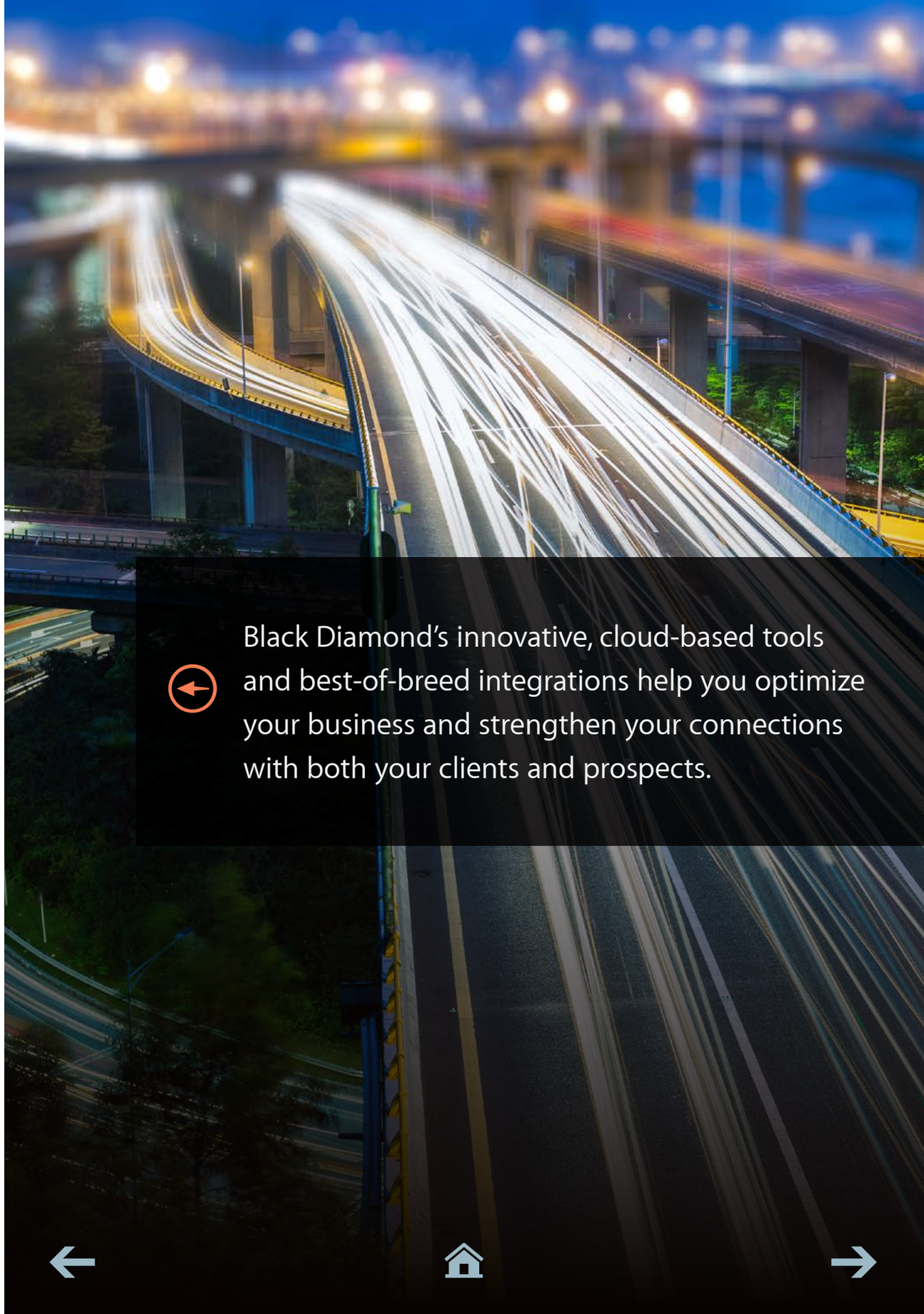
To learn more about our entire network of tight integrations for Black Diamond, visit:
blackdiamond.advent.com/integrations

A Purposeful Suite of Tools



With the Black Diamond Wealth Platform at the heart of your business, you can build an end-to-end, best practice technology stack, enabling you to manage your clients' complete wealth picture and deliver tech-powered services that exceed their expectations.

If you have questions or would like to learn more, please call **1-800-727-0605** or email **info@advent.com**. You can also visit **blackdiamond.advent.com**.



Black Diamond's innovative, cloud-based tools and best-of-breed integrations help you optimize your business and strengthen your connections with both your clients and prospects.

Black Diamond
WEALTH PLATFORM

blackdiamond.advent.com/integrations