Client View Application

Client-Focused Technology That Works the Way You Do

Client View is an intuitive application within SS&C Black Diamond® Wealth Solutions that works as your client command center. From within this centralized space, you can manage your clients' financial lives while driving their digital experiences.

Home of Your Day-to-Day Client Communication and Financial Management Needs.

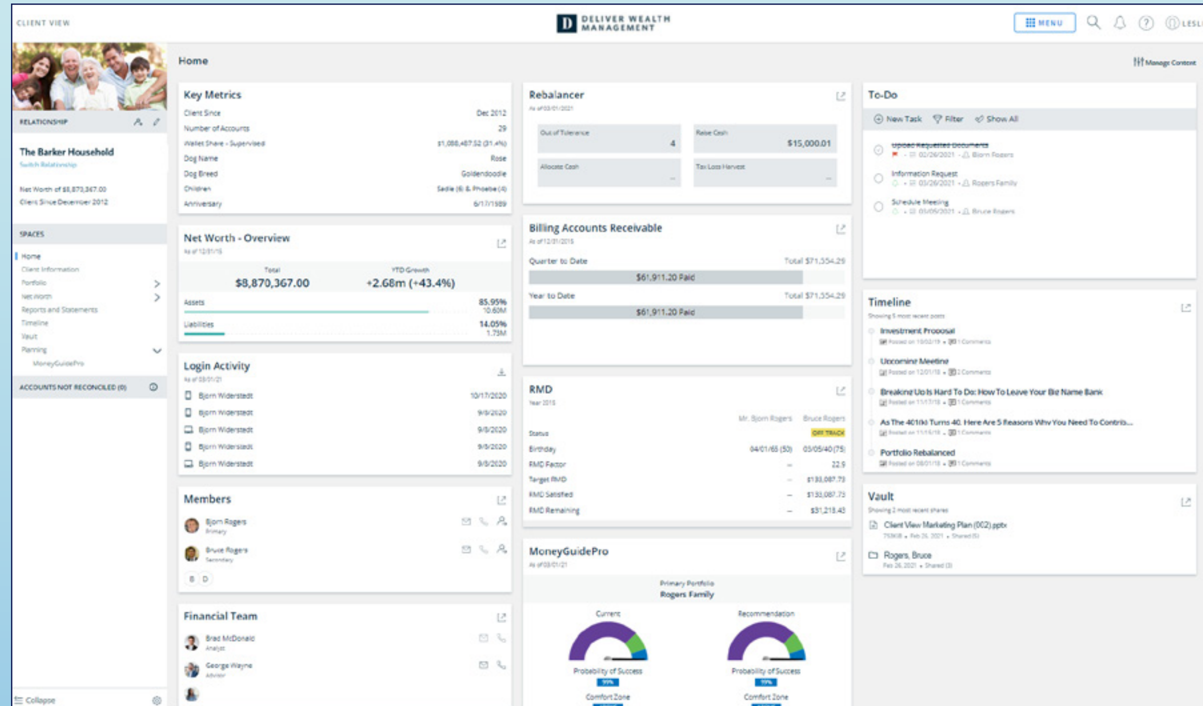
- **View & Manage Client Information**
- **Analyze Portfolio Metrics**
- **Manage Reports and Statements**
- **Oversee the Document Vault**
- **Customize The Experience**
- **Communicate on Your Client's Timeline**
- **Build the Full Net Worth Picture**
- **Include Long-Term Financial Plans**

Welcome to Your Command Center

Begin by viewing well-rounded, relationship-centric details in a succinct and action-oriented manner. A range of drag-and-drop widgets, such as Rebalancer, Net Worth, Portfolio, and Billing, means you can configure a Home experience with what's most important to you.

If you click into the widget, information turns into action by immediately connecting you to where you need to go. This means you can efficiently accomplish client-related workflows like:

- Send a Timeline communication to the Client Experience Portal
- Act on a tax-loss harvesting opportunity within Rebalancer
- Create a new task on your client's To-Do list



Easily review and manage all aspects of a client relationship within a single application.

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CLIENT VIEW APPLICATION
CLIENT-FOCUSED TECHNOLOGY THAT WORKS THE WAY YOU DO

View & Manage Client Information

View, manage, and update the details behind an entire household and any stakeholder contributing to their success.

Supplement your native platform data with information from key integration partners, such as your CRM or custodian partner.

Add relationship notes so you and other team members can stay on the same page and keep record of additional client information for future reference.

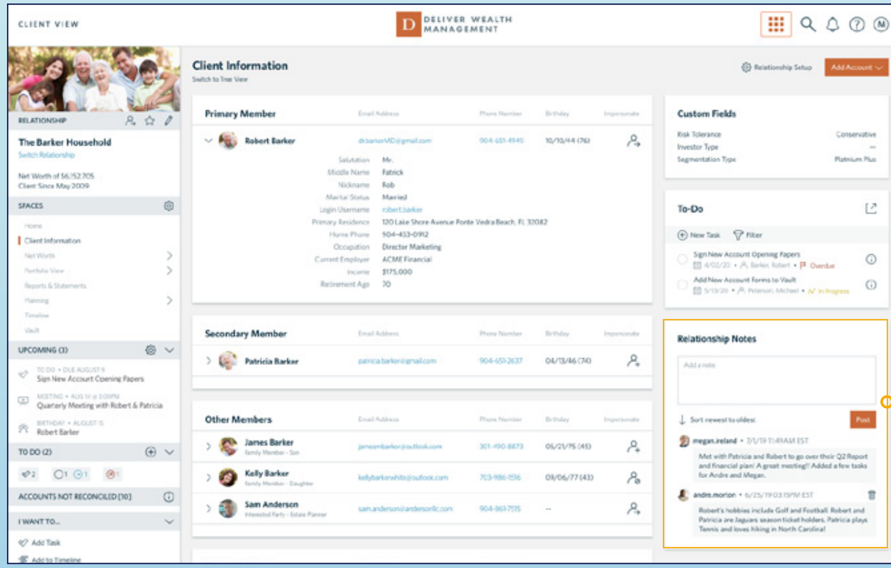
Analyze Portfolio Metrics

View extensive portfolio accounting, reporting, and analytics tied to your client.

Arrange dynamic metric cards like performance, allocation, or activity summary in a way that makes sense to you.

For a more in-depth analysis, expand any card to see additional details. Parameters, such as date ranges, can be adjusted, and the data updates in real time.

The incorporation of integration partner content, such as risk analytics, provides seamless and comprehensive insights.



Leave notes about any of your client relationships for others at your firm to view.

Dynamic metric cards can be rearranged and expanded.

Manage Reports and Statements

View and download existing Black Diamond-generated reports associated with your client, or quickly run a new, beautifully crafted report on the fly.

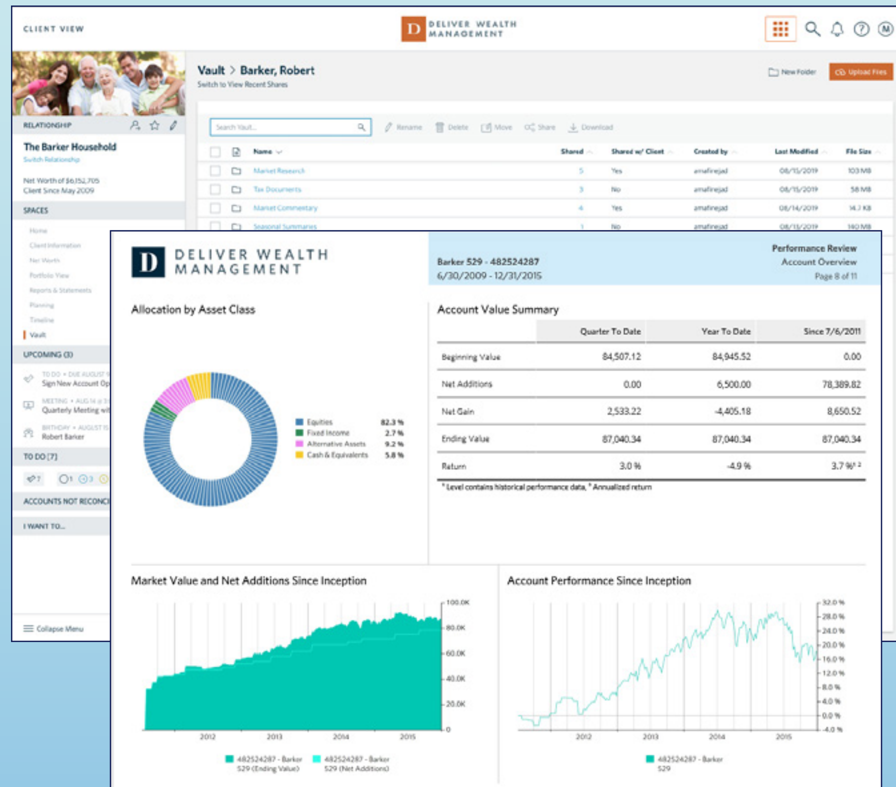
Client-related statements or tax documents imported from your custodian also live within this space.

From here, you can easily share any of these files via your client's Vault and optionally notify them through email or on their Timeline.

Oversee the Document Vault

Access and manage the Vault for all of your client's household members who use the Client Experience Portal as well as the related financial team.

The ability to apply folder structures and move documents keeps things efficiently organized. Uploading and sharing new documents is seamless, and you can choose to alert the applicable client to any new files.



Generate and then share beautifully crafted reports on your client's Timeline or within their Vault.

Customize the Experience

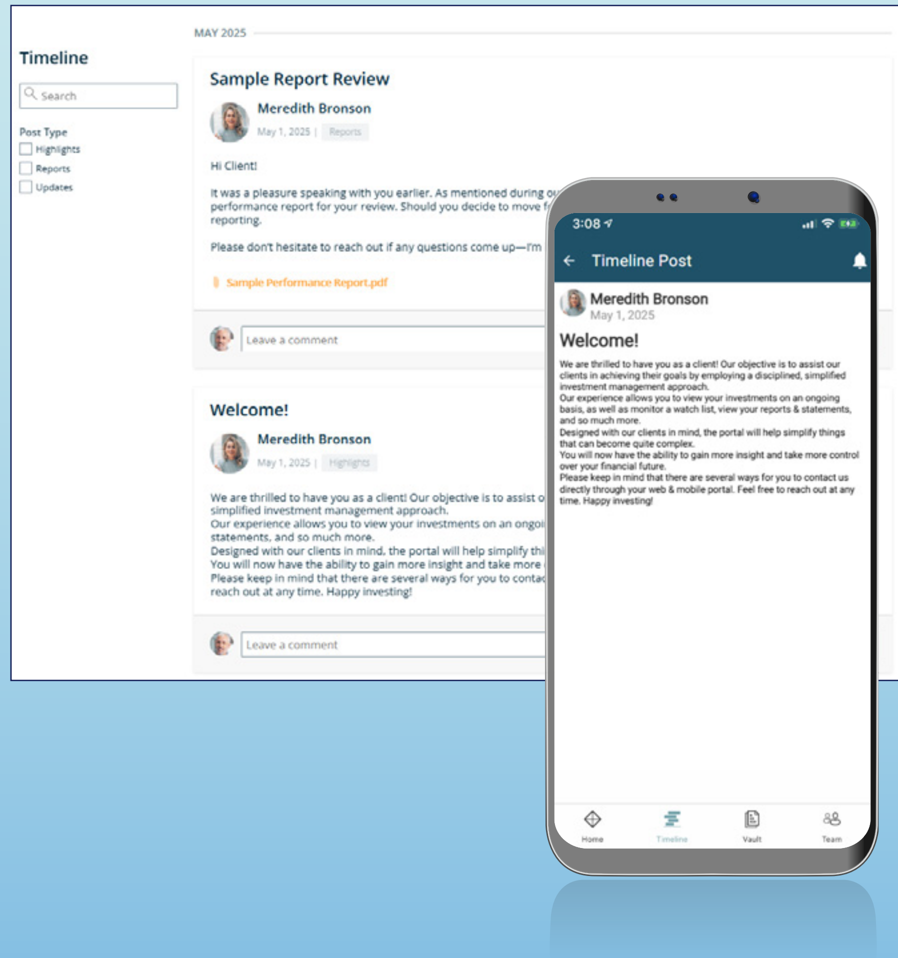
For a tailored experience, firm-wide, role, or user-specific settings can be configured to fit your needs. Firm administrators have the flexibility to enable or disable various features and a range of permissions, allowing them to customize the Client View experience according to operational functions within your firm.

Communicate on Your Client's Timeline

Posting messages on your client's Timeline within their Client Experience Portal is straightforward and continuously tracked. And, immediately after you send a new message, your client receives an automatic notification on their mobile device.

Your Timeline space within Client View also keeps track of messages and comments sent to you by your client and allows you to apply filters to easily search the communication history.

Numerous third-party solutions integrate with Timeline so you can send messages to your client's portal no matter the tool you are working in.



Your clients can view their Timeline anytime, anywhere.

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CLIENT VIEW APPLICATION
CLIENT-FOCUSED TECHNOLOGY THAT WORKS THE WAY YOU DO

Build the Full Net Worth Picture

Work within a collaborative and highly configurable balance sheet to capture your client's entire wealth picture.

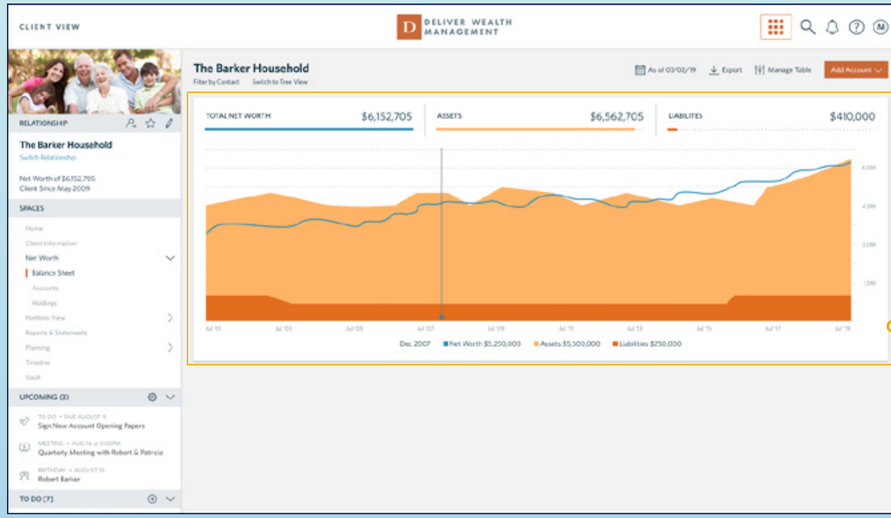
The design enables effortless aggregation, allows for valuation updates, and offers direct access to opening new custodial accounts.

Include Long-Term Financial Plans

Incorporate detailed financial plans to strategize for your client's future within the context of their entire financial life.

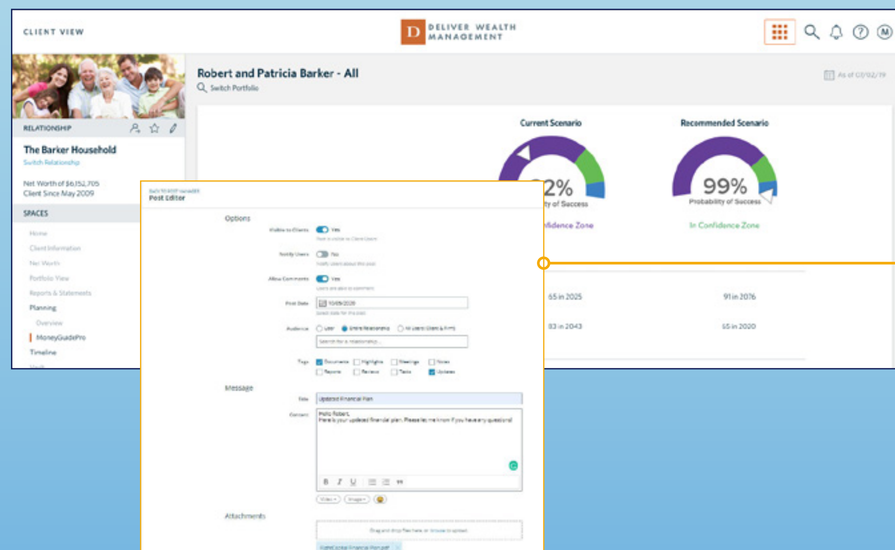
You can work with an outside planning solution natively within Client View. Or, leverage the Timeline integration from others, so updated plans can be sent directly to the Client Experience Portal.

This makes it easy for you to consistently share and communicate the keys to long-term success.



While you work on your client's balance sheet in Client View, your client can also make updates within their Client Experience Portal—making it easy to determine total net worth.

Visualize net worth changes over time. By moving your cursor along the graph, you will see the assets, liabilities, and net worth for the selected date.



View and track financial plans natively within Client View using the MoneyGuidePro® integration.

Post financial plans to your client's Timeline within their Client Experience Portal directly from outside solutions like RightCapital.

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Designed with You in Mind

Black Diamond® is leveraged by firms of all sizes to streamline operations, deliver business insights, and connect with both prospects and clients to build long-lasting relationships.

The Client View application centralizes all client-centric details, workflows, and third-party integrations already found within Black Diamond into a single, interconnected command center.

For More Information

To learn more about how SS&C Black Diamond Wealth Solutions can support your business and connect you with your clients, call 1-800-727-0605 or email info@sscblackdiamond.com. You can also visit sscblackdiamond.com.