

PRODUCT BRIEF

Reclaim Left-Behind Annuities with Annuity & Insurance Marketplace

Unlock Enterprise Value and Deliver Holistic Wealth Management

Retaining and growing client assets while scaling firm capabilities is crucial in today's competitive environment. Through the Black Diamond Annuity & Insurance Marketplace (AIM), users have integrated access to powerful annuity and insurance solutions to enhance their offerings and drive firm growth.

The AIM Breakaway Accelerator Program (BAP) empowers firms seeking to attract top-tier talent with an efficient solution to transition annuity books of business to an advisory model proactively. BAP can also help reclaim annuity books left behind by advisors who have already joined your firm. Reclaiming these assets can increase AUM and fee-based revenue, further strengthen the advisor-investor relationship,

and demonstrate that you understand and can help solve challenges for advisors moving away from their broker-dealers.

AIM makes expanding your firm's offering easy with fiduciary solutions your client wants and needs. All Black Diamond users benefit from a fully integrated experience, complete with single sign-on. It empowers advisors to access education, tools, products, and reporting capabilities to include annuities and insurance in their client's complete wealth picture.

How It Works

Data-Driven Discovery.

AIM's software analyzes our clients' current annuities and identifies opportunities for improvement through exchange to fee-based solutions, if suitable.

Comprehensive Support.


DPL Financial Partners is named Agent of Record for accounts unsuitable for exchange, ensuring you control the client experience.

Advisor Enablement.

Advisors are eligible to be paid an advisory fee for ongoing management and investment advisory services and have access to interactive tools, and educational resources to power productive client conversations and improved outcomes.

Lifecycle Optimization.

As legacy policies mature, AIM Consultants support transitions to low-cost advisory annuities aligned with clients' financial goals.



There is no way we could have transitioned the number of contracts, analyzed them to ensure they were better for the client, handled the paperwork, and more. The Annuity & Insurance Marketplace has taken a huge load off of our firm.

— **Scott Marquardt**
Managing Partner, CFP

Black Diamond's Annuity & Insurance Marketplace Benefits All Areas of Leadership

CIO:

Expand your firm's investment suite with scalable, non-correlated solutions that align with client goals and fiduciary standards.

CEO:

Increase firm valuation while deepening client relationships through scalable holistic service delivery.

CMO:

Leverage DPL's trusted brand, award-winning technology, and extensive educational resources to engage current clients and attract new prospects.

CTO:

Seamlessly integrate powerful annuity discovery and management tools into existing technology platforms.

CFO/CGO:

Grow billable AUM and scale fee-based revenue streams with a repeatable annuity program.

CCO:

Help ensure compliant and fiduciary alignment with annuities and insurance using DPL's data-driven approach and licensed expertise.

Deliver Unmatched Client Value

Retain Control:

Protect and strengthen client relationships while transitioning to modern, low-cost annuity and insurance solutions.

Unlock Opportunities:

Provide clients with a range of low-cost annuity solutions that potentially deliver greater value and performance potential than existing annuities.

Fiduciary Excellence:

Maintain oversight of annuity assets with the support of licensed AIM Consultants' expertise.



For more information

Take control of your firm's annuity and insurance strategy to position your enterprise for long-term success. Connect with us to learn how:

ssblackdiamond.com
info@ssblackdiamond.com
1-800-727-0605