

PRODUCT BRIEF

An *Almost* Effortless Transition to Black Diamond

Morningstar Office users benefit from a customized data conversion process.

Converting from one technology partner to another can be a huge undertaking of your firm's resources. This is especially true when it may not have been part of your firm's plan. An exercise like this often requires a significant amount of work to audit, clean and convert years' worth of data, work through any transfer errors, and finally start fresh with the new platform.

To help ease this process, we developed a proprietary data conversion and implementation process specifically designed for Morningstar Office users. This tool, and our proven process, is backed by years of successful conversions from Morningstar to our cloud-native Black Diamond® Wealth Platform. Additionally, we've worked directly with the Morningstar team to further enhance the conversion process.

Now, Morningstar users can convert directly to Black Diamond for a seamless transition including:

- Full Since Inception Transaction Conversion
- Transfer of Account Grouping and Reporting Targets
- Creation & Assignment of Fee Schedules and Billing Configuration

To make the transition process run smoothly, we do most of the work on your behalf:

STEP 1:



Authorize Custodial Data to Black Diamond

STEP 2:



Morningstar Transfers Key Data Directly to Black Diamond

STEP 3:



Black Diamond Converts Key Data and Publishes for Your Review

STEP 4:



Validate and Sign Off on Data Conversion

STEP 5:



That's it! You're Ready to Go!