SS&C Black Diamond WEALTH SOLUTIONS

PRODUCT BRIEF

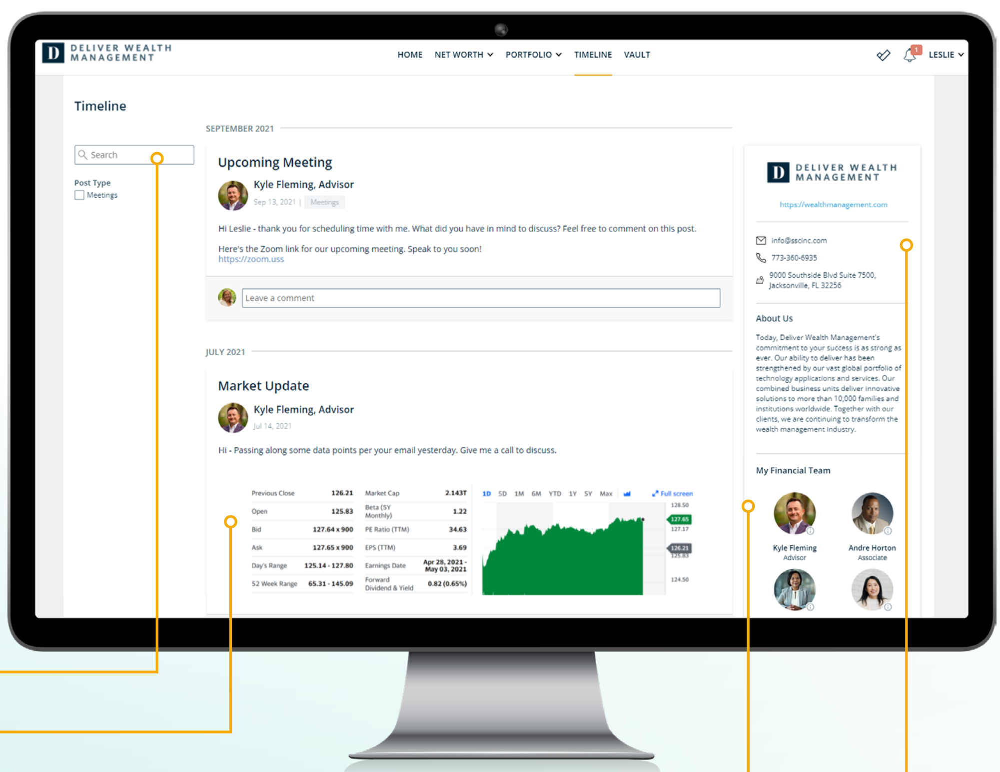
Client Relationship Timeline

Home to your client’s financial journey.

With a modern, mobile-friendly design, the Client Experience Portal provides clients with a comprehensive view of their finances, reinforcing the value you deliver.

By introducing clients to the unique Relationship Timeline capability within the portal, you create a shared, intuitive digital experience that keeps you, your client, and key stakeholders aligned on their financial journey.

Designed for today’s busy clients, the Relationship Timeline brings clarity to a fragmented financial world by displaying key interactions in a familiar, easy-to-navigate web feed, providing clarity and memorializing key interactions throughout your advisor-client relationship.



Search post content and title

Scroll to see post history

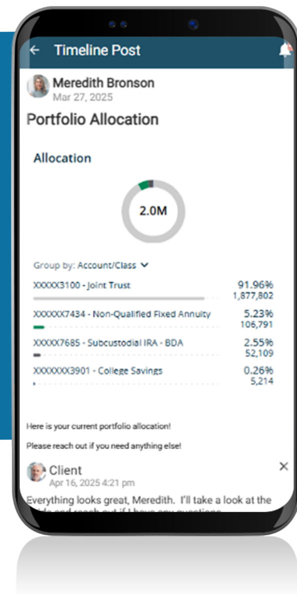
View your financial team at a glance

See your firm’s contact information and summary

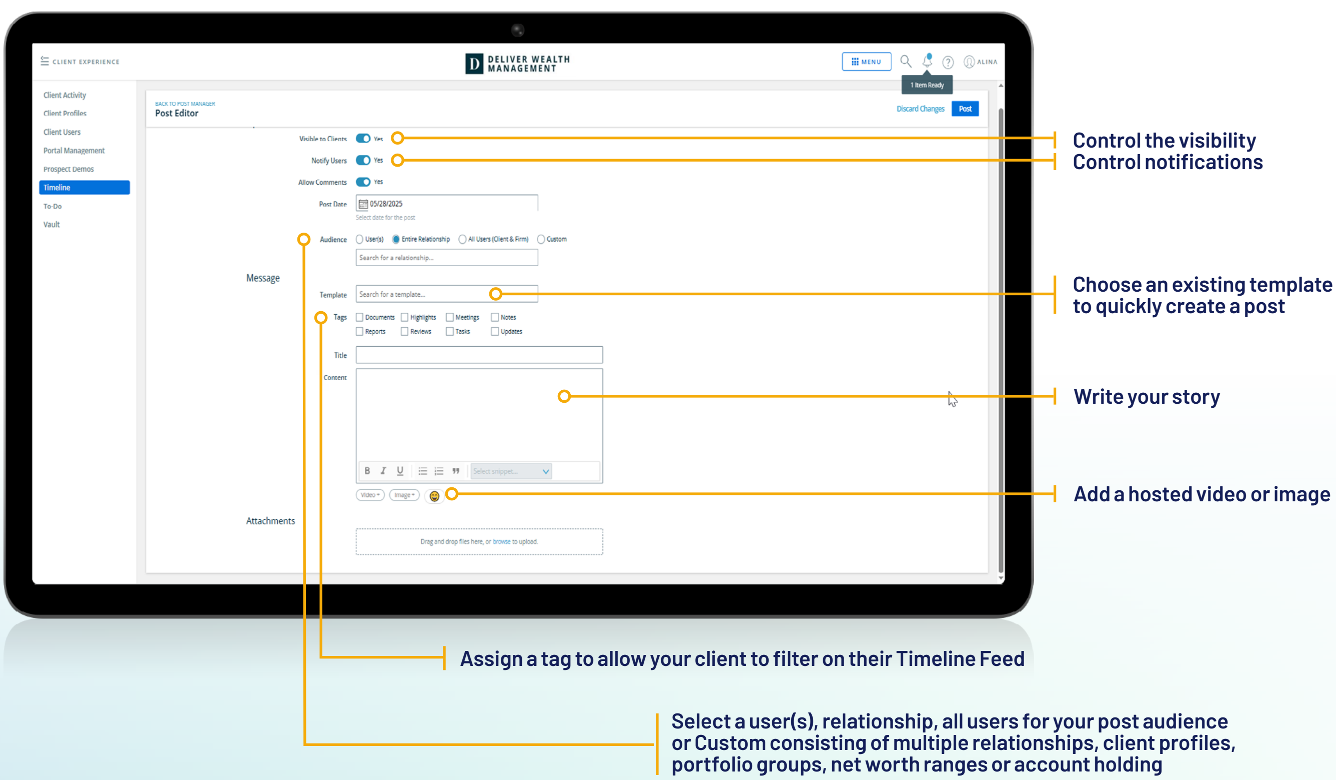
Within this trusted and secure collaborative experience, you can track the history of the advisor-client relationship and provide context around opportunities and changes. When you update the Relationship Timeline with items such as meeting notes, reports, goal information, and successes, your client can see how you are helping them realize their dreams.

Available at your client's point of need

Your clients can connect to their financial lives 24/7 through Black Diamond's native mobile app. Here, they can view their Relationship Timeline, portfolio details, the Document Vault, and more!

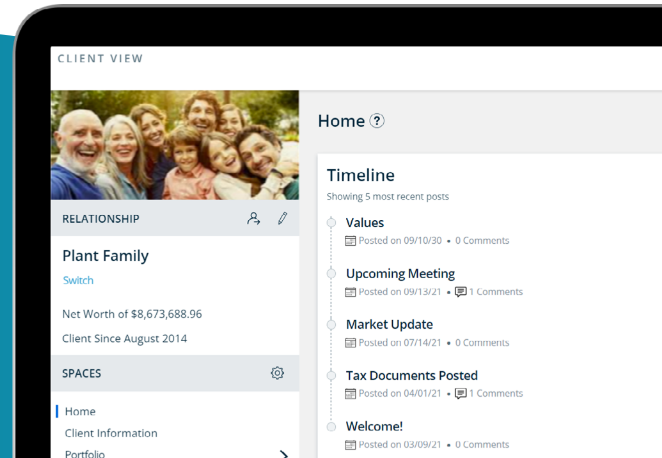


Through the intuitive advisor dashboard, you can easily manage the Relationship Timeline across all of your clients.

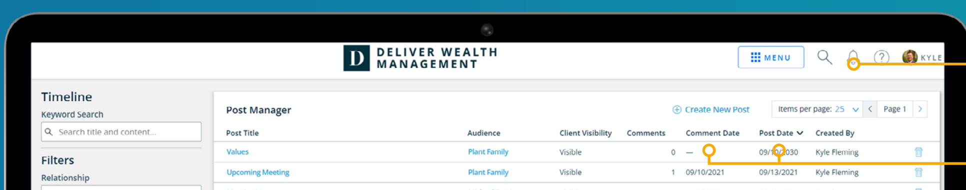


The Relationship Timeline was designed to provide a best-in-class user experience for both the investor and advisor. Advisors can easily see the top posts, sort by top post activity, and save frequently used Timeline posts as future post templates.

See the top posts for the relationship on your customizable home screen in Client View.



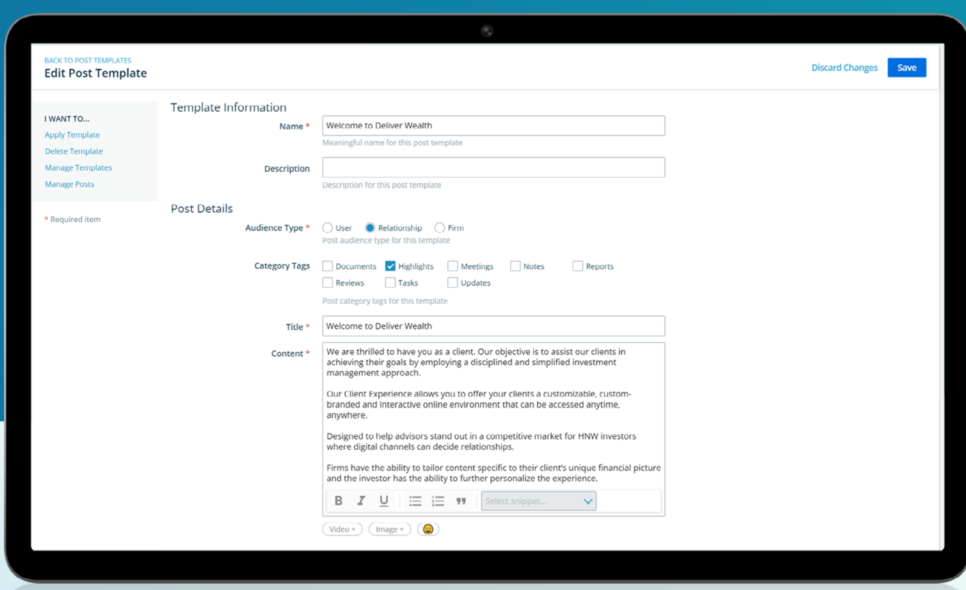
Post Manager gives you a view into all of the Timeline posts.



Receive notifications when new comments are added

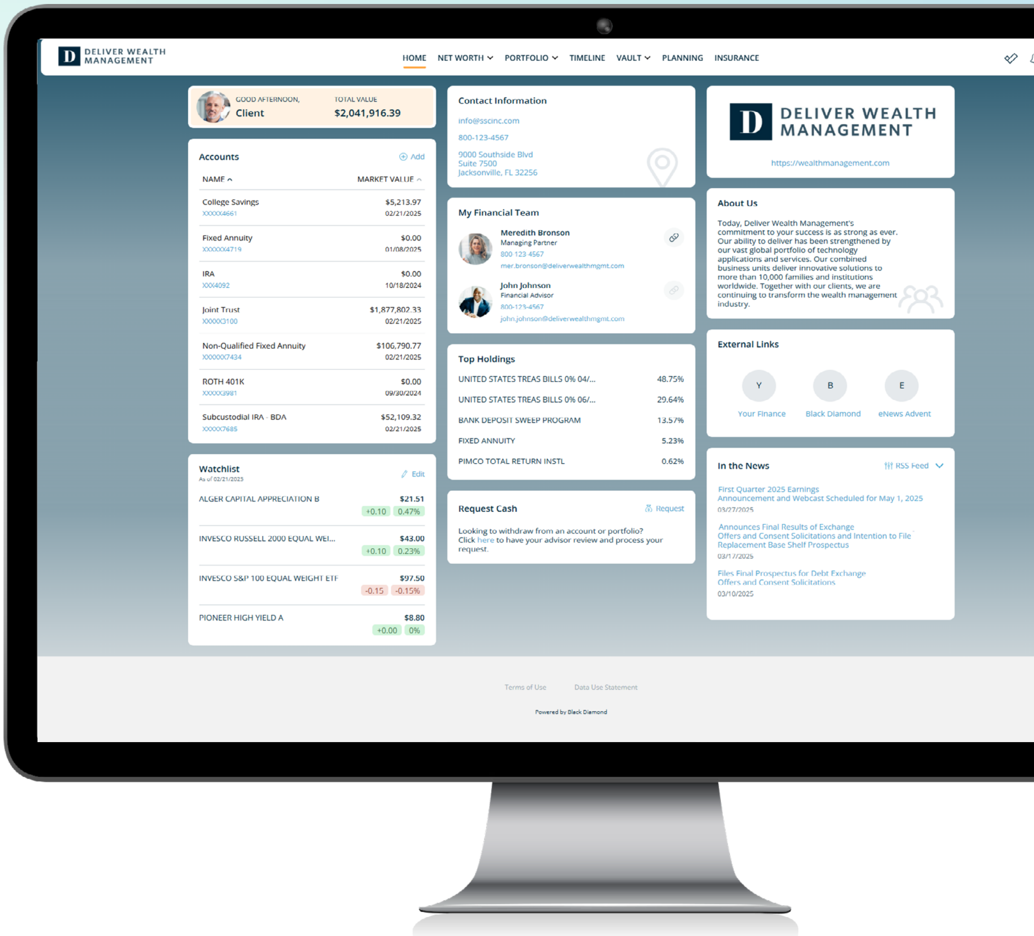
Sort the view by *Post Date* or *Comment Date* to see recent activity

Post Editor allows you to save frequently used Timeline posts as templates for quick creation. For example, a welcome post that all clients receive.



About the Black Diamond Client Experience Portal

The Client Experience is a custom-branded and interactive online portal environment, accessible anytime, anywhere on any device. It was designed to elevate the advisor-client dialogue, enriching relationships and demonstrating your value. Along with the Relationship Timeline, it includes a Portfolio Space dashboard, Document Vault, and Personal Finance page, enabling clients to see their complete wealth picture.



For more information

Black Diamond's Client Experience Portal transforms how financial lives are managed by supporting effective dialogue and delivering past, present, and future financial insights—all within a single application. And, your clients see you as the driving force behind that value.

If you'd like to add the Relationship Timeline to your Client Experience instance, please contact your dedicated Black Diamond service team. Or, to learn more about all that SS&C Black Diamond Wealth Solutions has to offer, contact us today.

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