

PRODUCT BRIEF

Personalized Mobile App Solutions

Two ways to set up your app.

As your partner, we can help you connect with your clients to provide true value. The Client Experience Portal offers your clients a customizable, branded, and interactive mobile app environment that they can access anytime, anywhere. Choose between one of two options for branding your firm's personalized app.

	Option 1: Black Diamond-Led Experience	Option 2: Private Label Experience
Description	<ul style="list-style-type: none"> • Clients will be prompted to download the Black Diamond app from the App Store. • Your firm logo, color palette, advisor images and contact information will appear once your client is logged in to the app. • Your clients will be able to further personalize the app to meet their needs. 	<p>The same customization options noted in Option 1 apply, plus:</p> <ul style="list-style-type: none"> • Client will be prompted to download your firm's specific app from the App Store where you have specified the app's description, contact information, and search keywords. • Your firm's logo will be visible on the login screen and as the touch icon on phone and tablet devices. <p>App upgrades and maintenance will coincide with enhancements made to the Black Diamond-led experience.</p>
Setup/ Turnaround	<ul style="list-style-type: none"> • Customization setup is available in Black Diamond. • Immediately available. 	<ul style="list-style-type: none"> • To meet Apple* and Google standards, your firm must create a unique firm Developer Account and apply for a Dun & Bradstreet Number (DUNS). • 4-6 week turnaround.
Associated Costs	<ul style="list-style-type: none"> • No additional cost. 	<ul style="list-style-type: none"> • \$2,500 one-time setup fee. • Ongoing monthly maintenance fee: \$208.33 per month/\$2,500 annually. • Third-party developer account fees from Apple and Google Play, as applicable. • Fee to set up a DUNS, if not already available.

*Private Label Experience is dependent on rules and approvals set forth by Apple. We plan to support this option as long as Apple continues to approve creation.

For more information

The Black Diamond Client Experience portal is just one more way we're helping you give your clients the personalized, one-of-a-kind service they deserve.

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