

Black Diamond Wealth Platform Research & Analytics Bundle

A comprehensive suite of portfolio management, reporting, and client engagement tools—infused with Morningstar's unparalleled data and analytics—all at competitive, exclusive strategic alliance pricing.

Exclusive Strategic Alliance Pricing for current Morningstar Office clients.

Five-Year Term ensures long-term stability with consistent pricing.

Promotional Period: enjoy **50% discounted pricing** for the first twelve months if signed up by June 30th, 2025.

Waived Implementation fee including full daily transaction and position conversion, households, and fee schedules.

No double pay while running both platforms in parallel during implementation.

Morningstar Direct Advisory Suite access included.

ByAll-Account conversion fees are waived, and extra per-account fees are waived during the initial term.