FINANCIAL FORUM
WEALTH MANAGEMENT

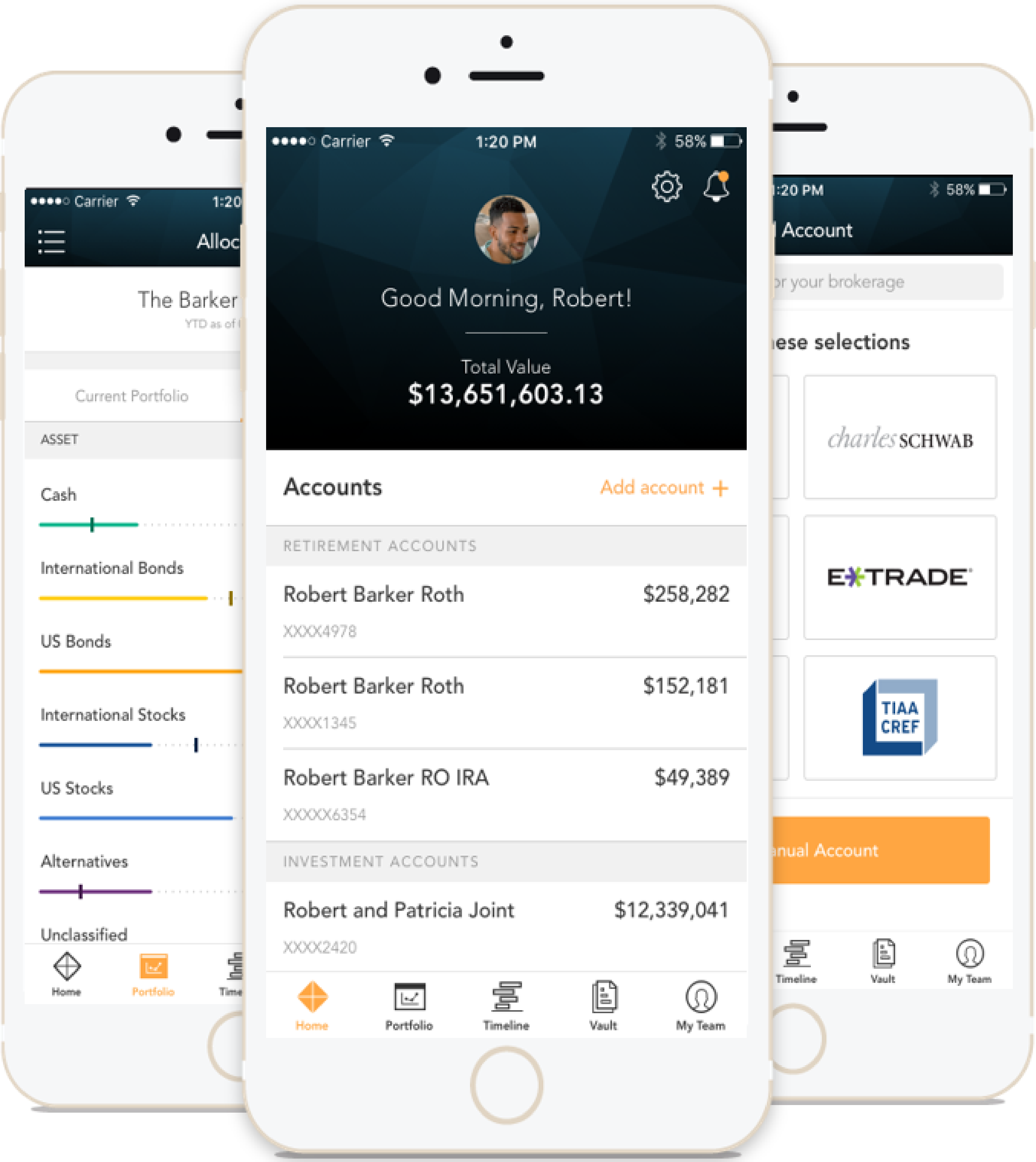
OUR NEWEST TECHNOLOGY PLATFORM

PERSONAL FINANCIAL PORTAL

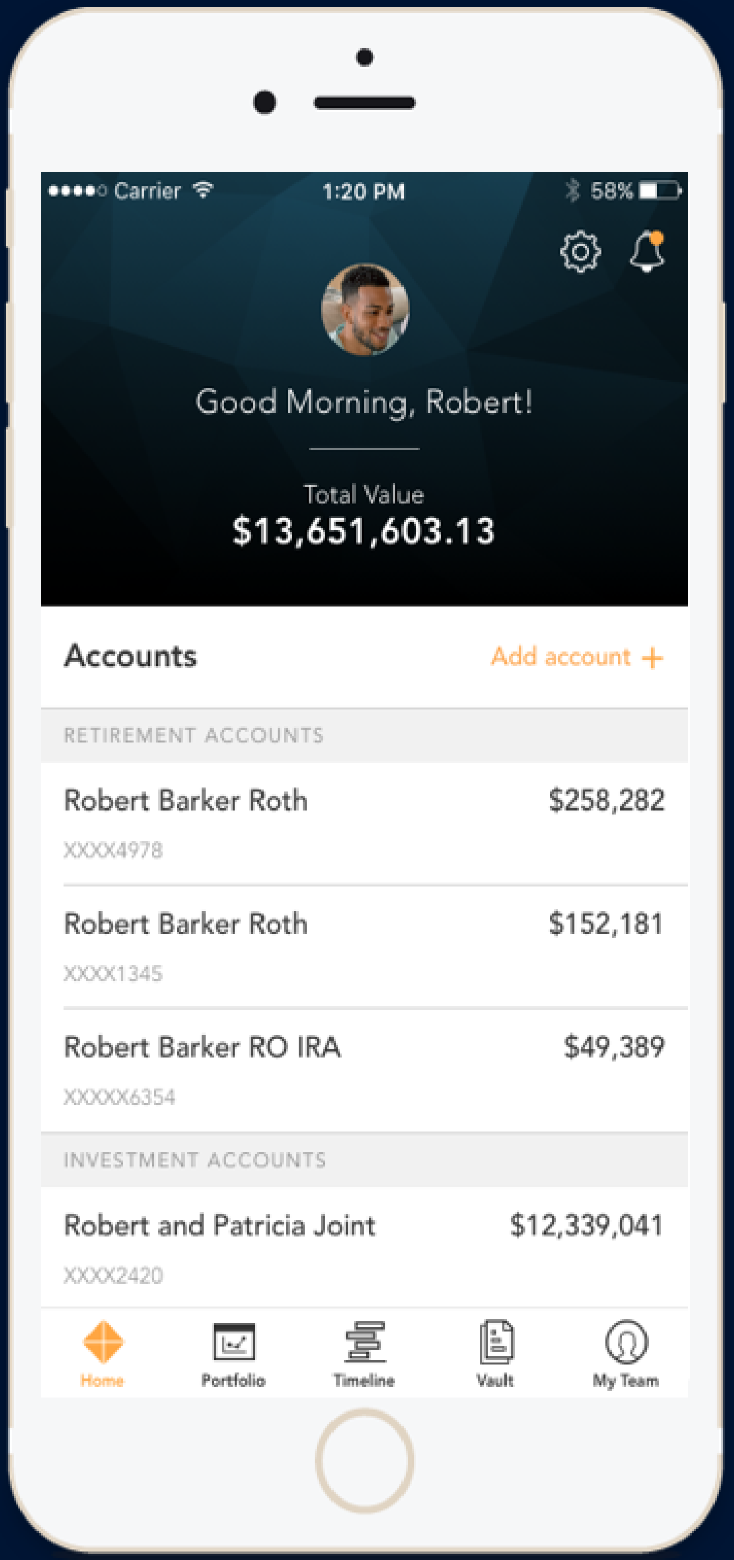
A guide for first-time users

PERSONALIZED FOR YOU

From your portal, you have access to unique information and insights, account details, your investment dashboard, document vault, and more. Instantly from any of your devices!



THE USER STARTUP GUIDE



HOME PAGE

AT-A-GLANCE VIEW OF PERTINENT ACCOUNT INFORMATION

When you log in, you'll see your personalized home page. Across the top of the website or bottom of the mobile app, you have quick access to the other pages of your portal.

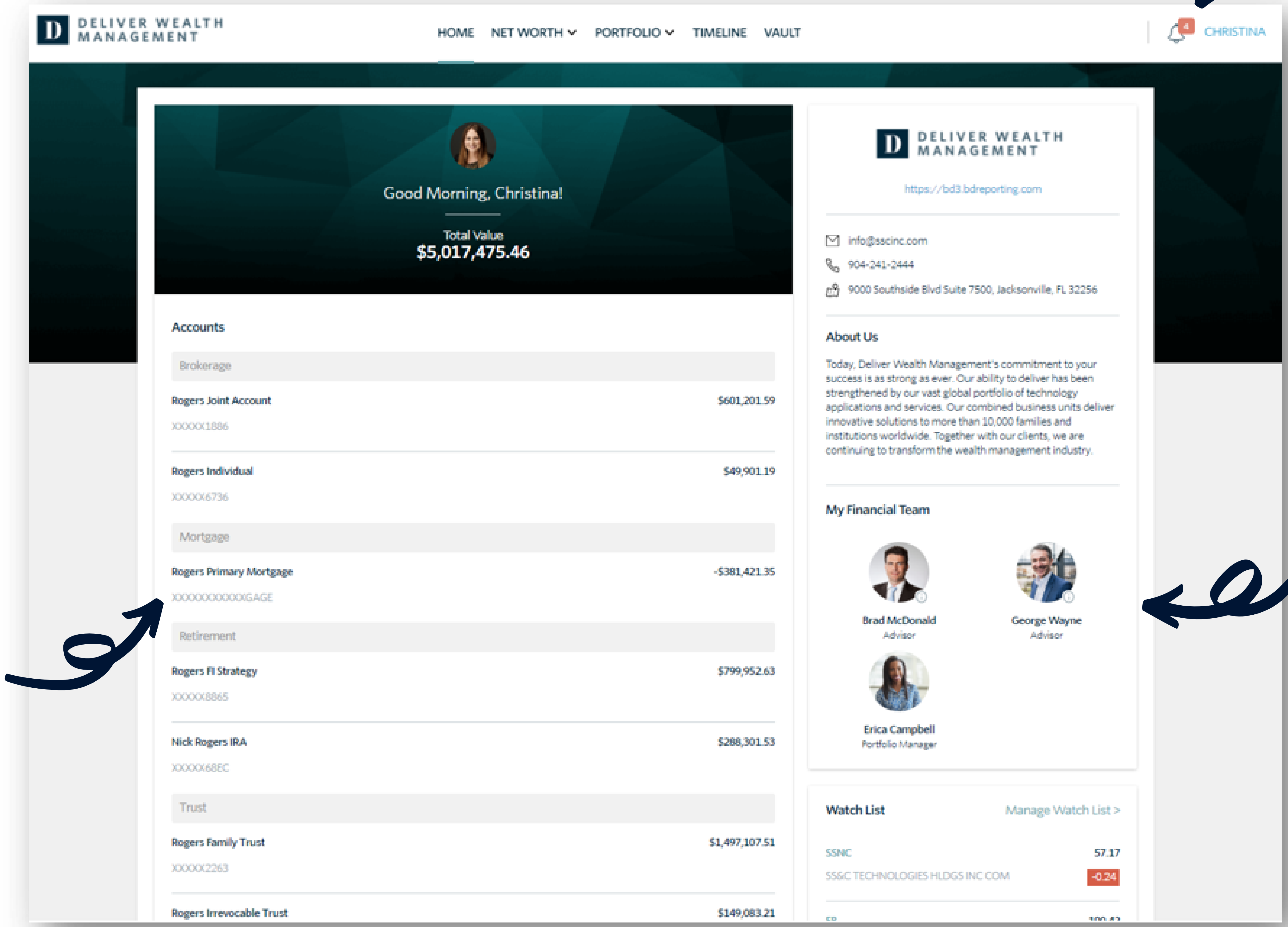
Your accounts and total portfolio value are listed front and center. Below your accounts, you'll also find your top holdings for quick reference.

Stay connected to your financial team with clickable links to phone numbers, emails, and our office location.

In addition to you contacting us, we can send you communications and updates—all directly within the portal.

HOME PAGE

View notifications from your advisor



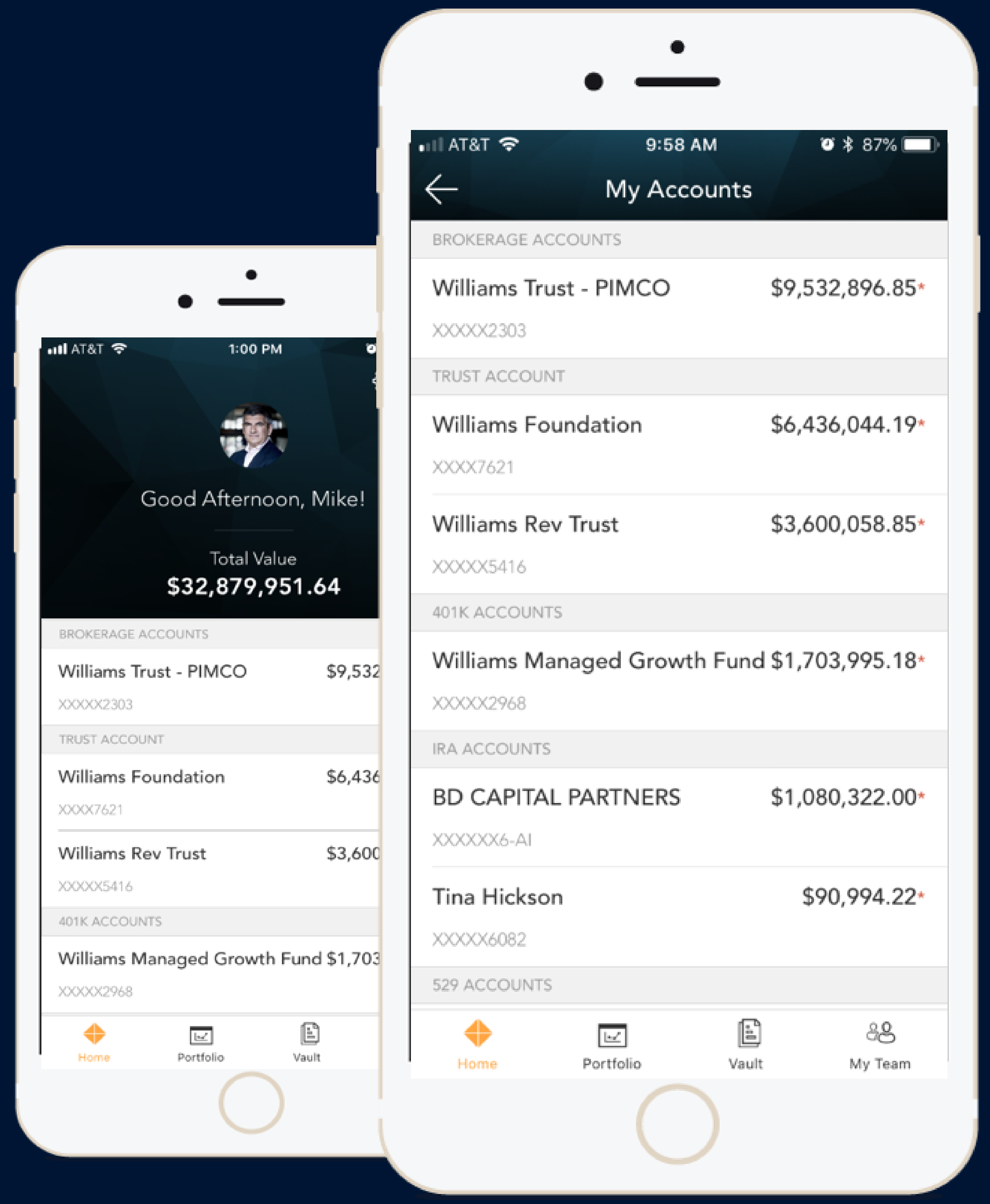
Communicate or schedule an appointment with your financial team directly

Quickly view your accounts as an aggregate total or grouped by category

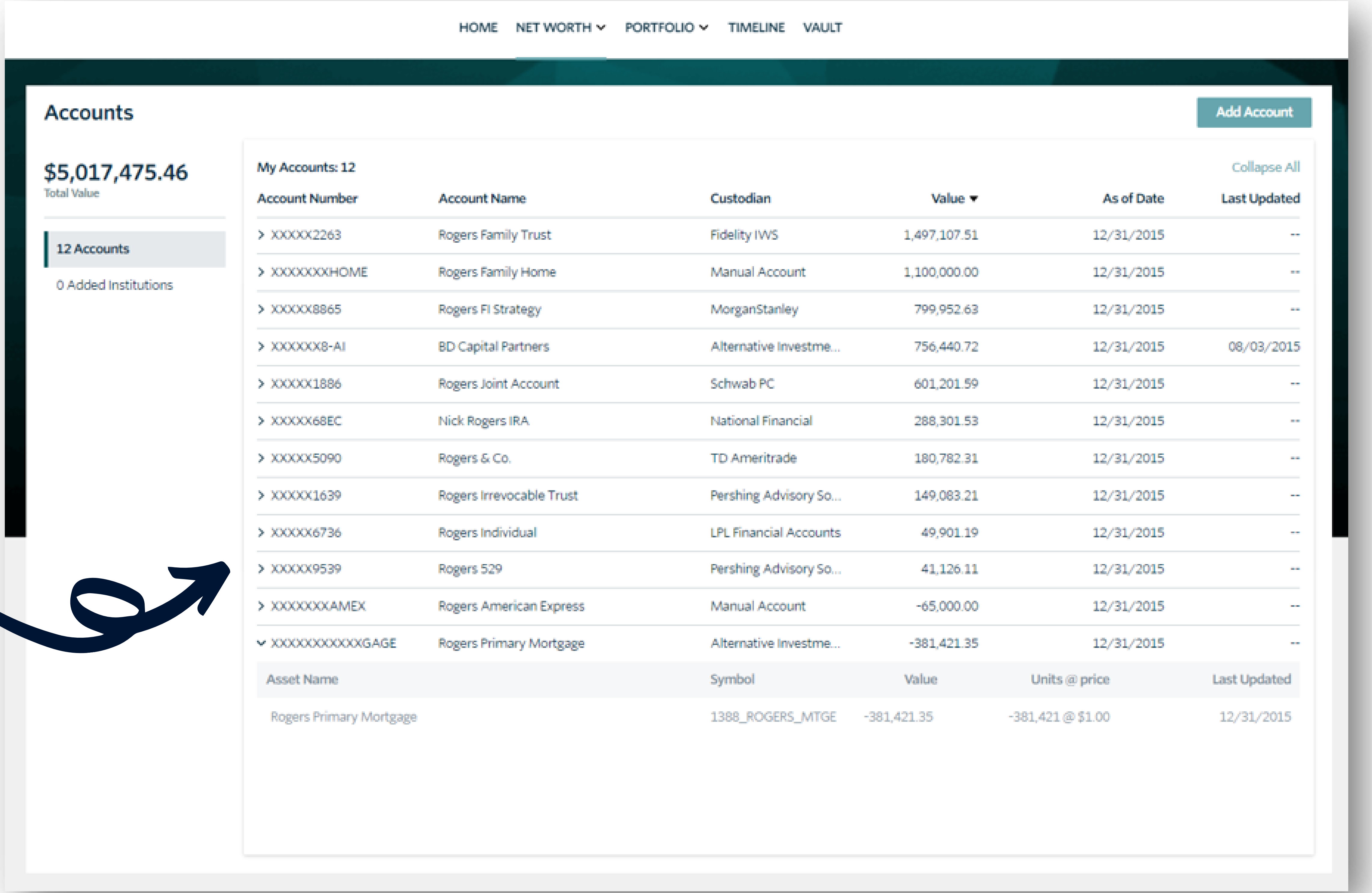
NET WORTH

ABILITY TO EXPAND ACCT TO SEE YOUR HOLDINGS & INDIVIDUAL VALUES

Within the Net Worth space, the My Accounts page provides a detailed list of your accounts with the ability to aggregate and manage outside accounts or manual accounts. (i.e. 401k, etc.)



NET WORTH



HOME NET WORTH PORTFOLIO TIMELINE VAULT

Accounts

Add Account

$5,017,475.46
Total Value

12 Accounts
0 Added Institutions

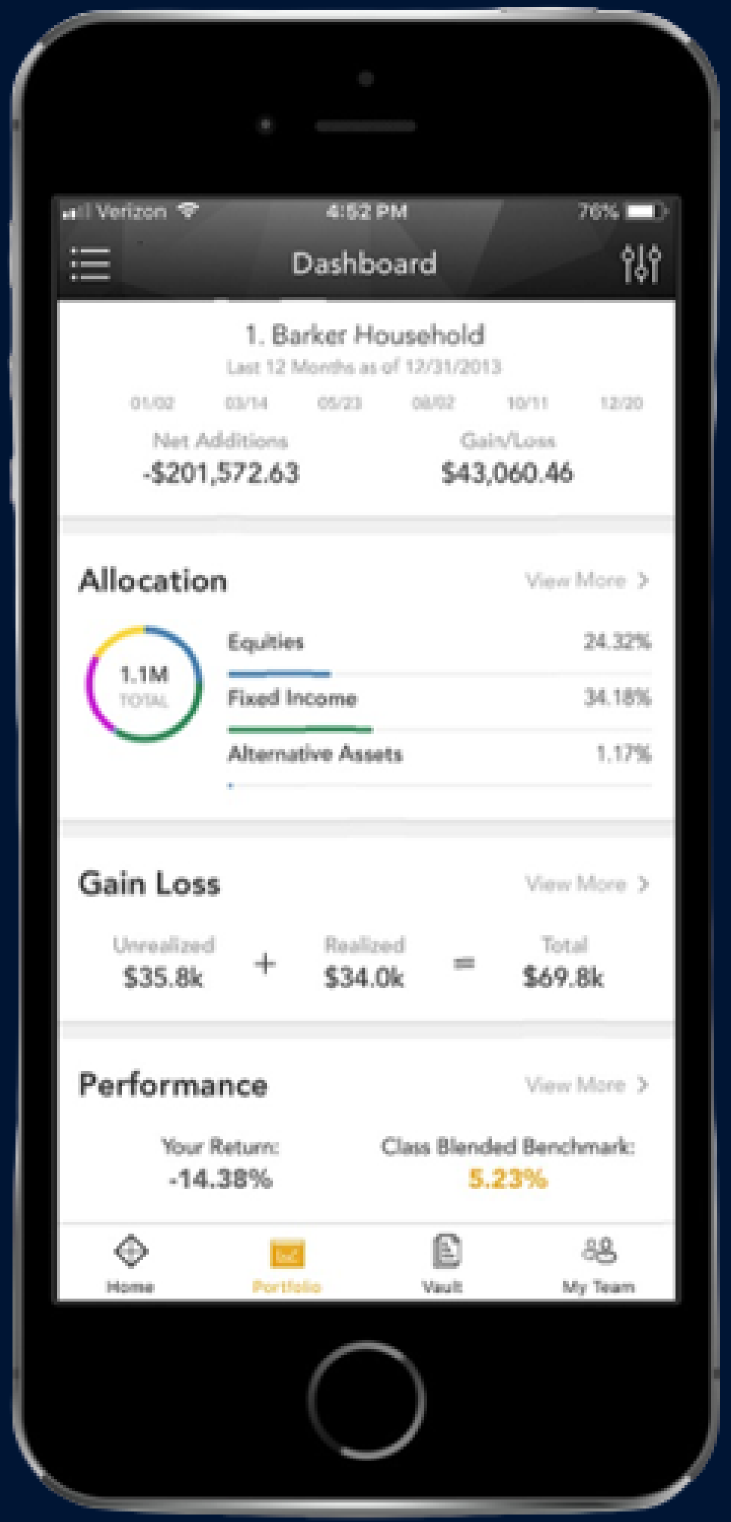
My Accounts: 12

Collapse All

Account Number	Account Name	Custodian	Value	As of Date	Last Updated
XXXXX2263	Rogers Family Trust	Fidelity IWS	1,497,107.51	12/31/2015	--
XXXXXXXHOME	Rogers Family Home	Manual Account	1,100,000.00	12/31/2015	--
XXXXX8865	Rogers FI Strategy	MorganStanley	799,952.63	12/31/2015	--
XXXXXX8-AI	BD Capital Partners	Alternative Investme...	756,440.72	12/31/2015	08/03/2015
XXXXX1886	Rogers Joint Account	Schwab PC	601,201.59	12/31/2015	--
XXXXX68EC	Nick Rogers IRA	National Financial	288,301.53	12/31/2015	--
XXXXX5090	Rogers & Co.	TD Ameritrade	180,782.31	12/31/2015	--
XXXXX1639	Rogers Irrevocable Trust	Pershing Advisory So...	149,083.21	12/31/2015	--
XXXXX6736	Rogers Individual	LPL Financial Accounts	49,901.19	12/31/2015	--
XXXXX9539	Rogers 529	Pershing Advisory So...	41,126.11	12/31/2015	--
XXXXXXXAMEX	Rogers American Express	Manual Account	-65,000.00	12/31/2015	--
XXXXXXXXXXXXGAGE	Rogers Primary Mortgage	Alternative Investme...	-381,421.35	12/31/2015	--

Asset Name	Symbol	Value	Units @ price	Last Updated
Rogers Primary Mortgage	1388_ROGERS_MTGE	-381,421.35	-381,421 @ $1.00	12/31/2015

Click on accounts to view holding level detail



PORTFOLIO

DYNAMIC VIEW OF YOUR ENTIRE PORTFOLIO

The Portfolio dashboard provides additional details about your portfolio, shown through performance cards highlighting key information about your portfolio.

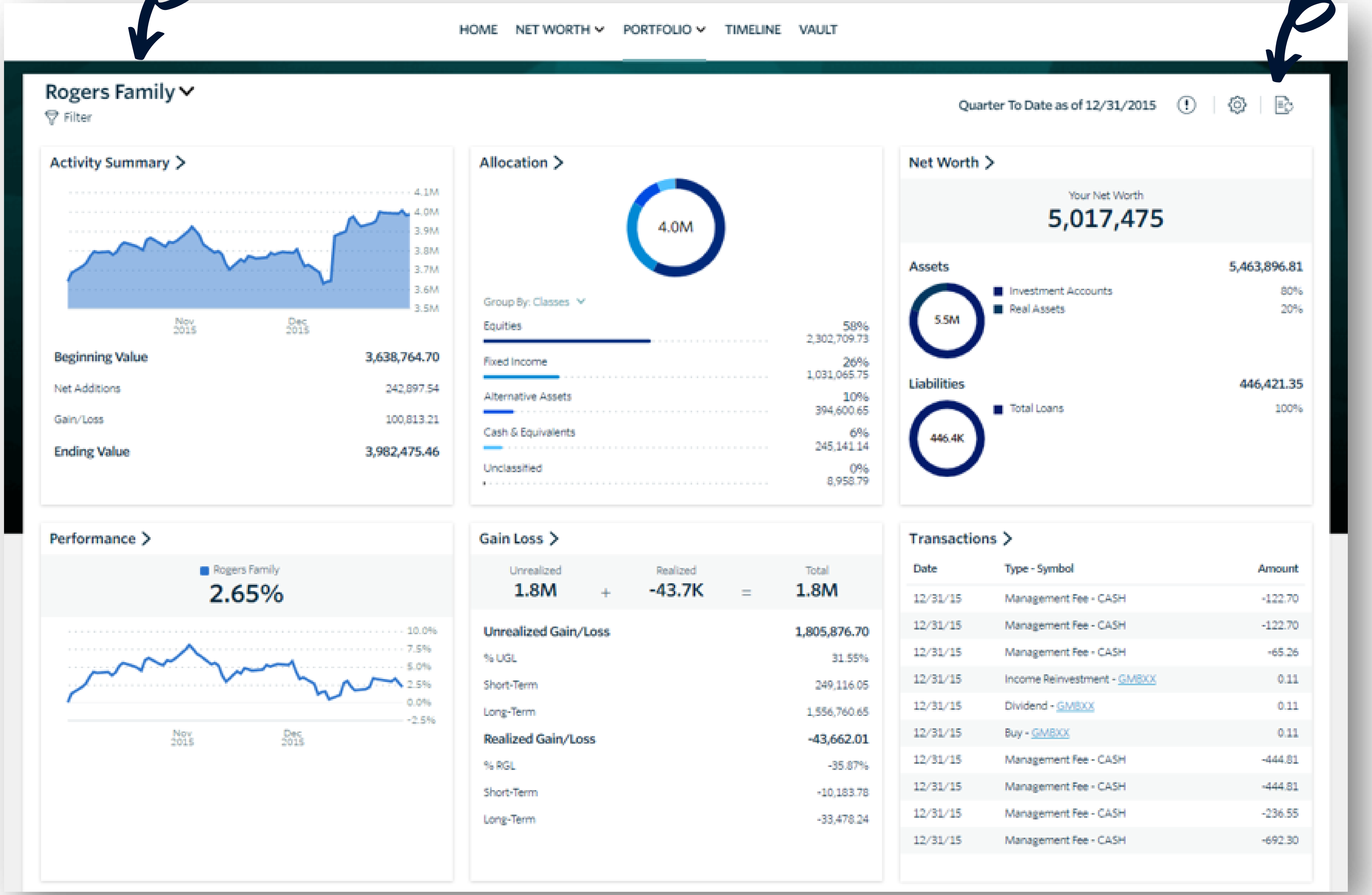
For additional detail, click on the title of each card. You can also use the drop-down menu to switch between different cards quickly.

All of this is completely customizable using filters to select specific date ranges, portfolios, or accounts.

PORTFOLIO

Change your portfolio or filter for specific accounts

Run Reports directly from your portal

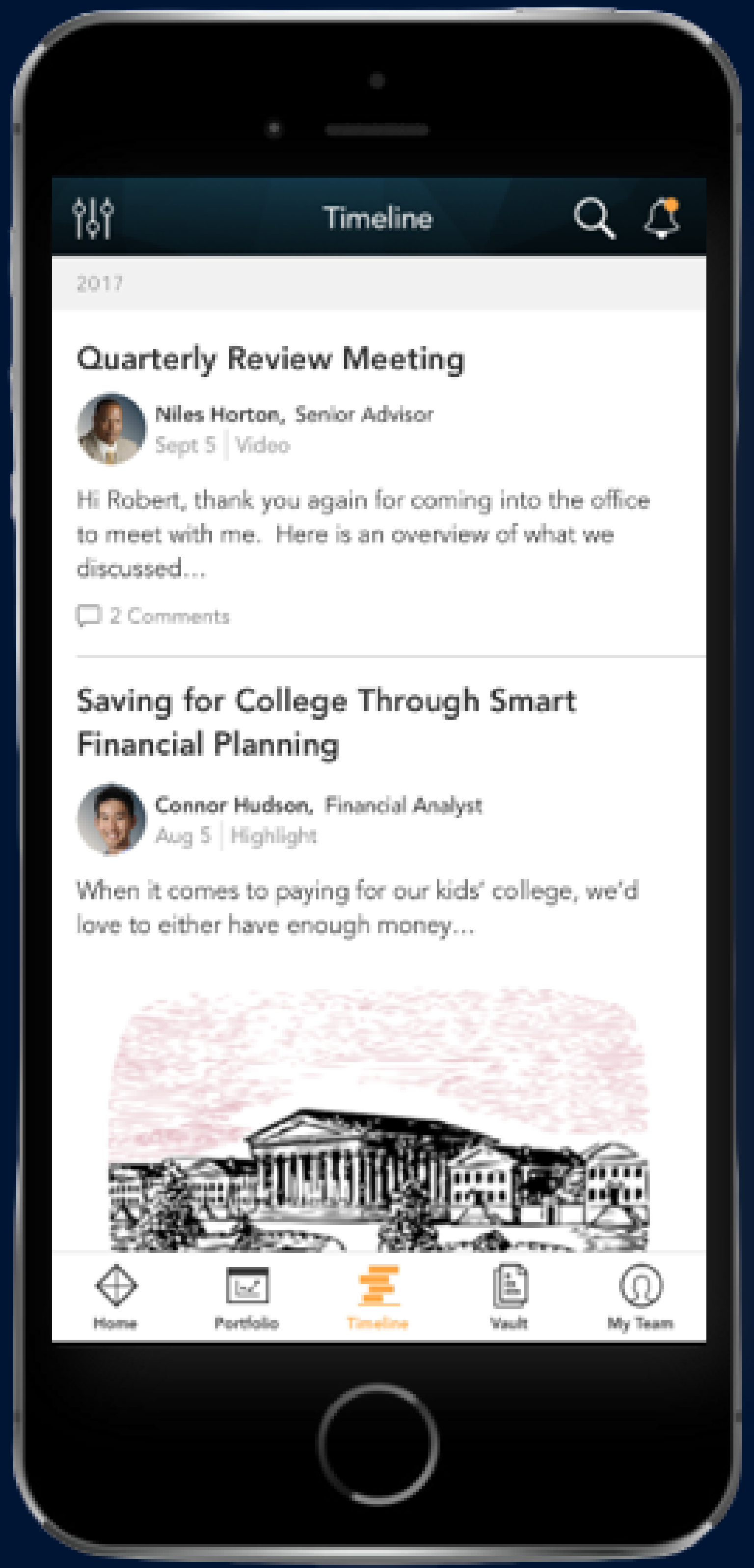


RELATIONSHIP TIMELINE

COMMUNICATION TOOL

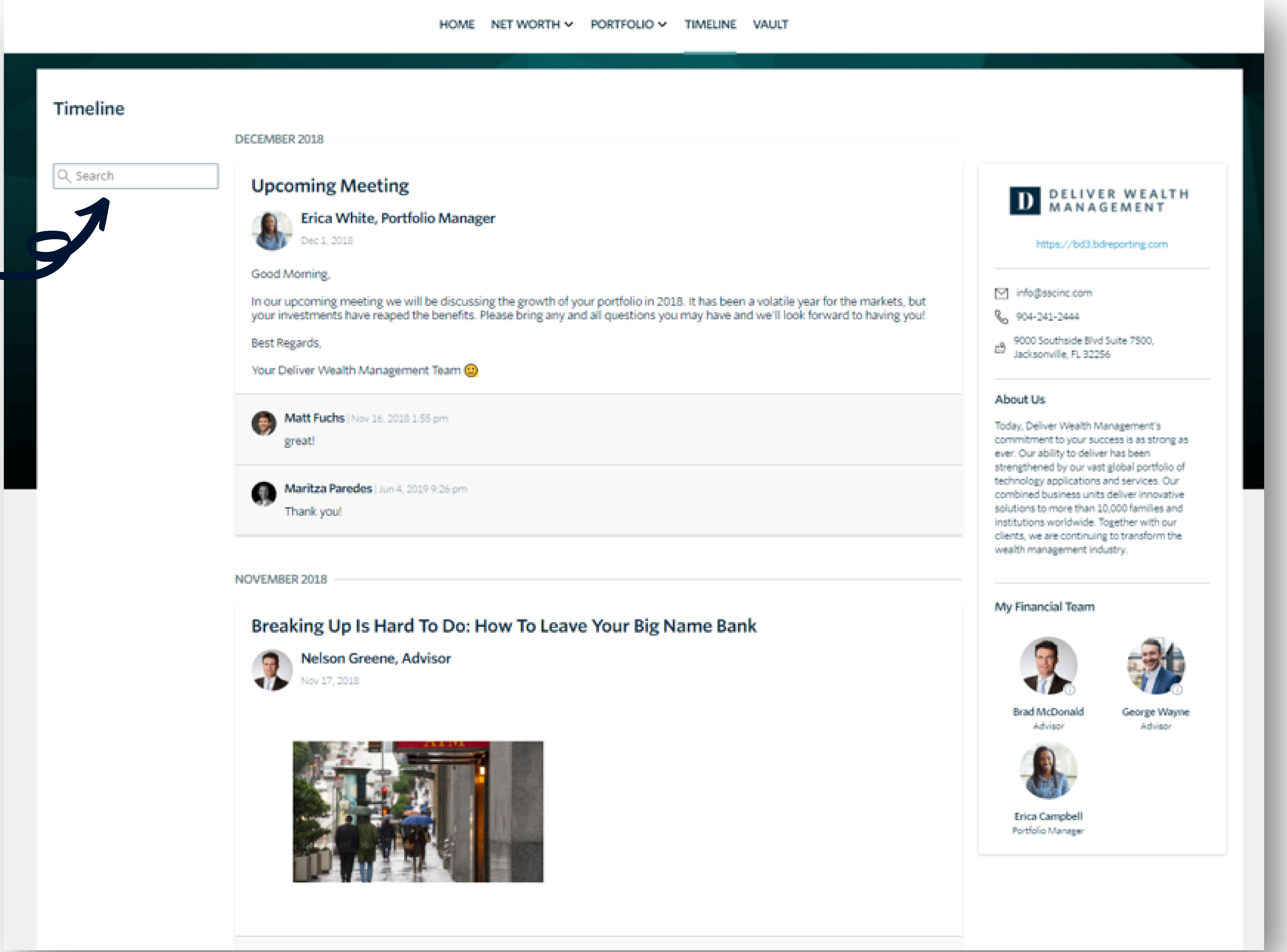
The Relationship Timeline is a consolidated, curated feed of posts designed to memorialize interactions that occur between you and your team! There are countless events and activities representing your financial life journey and Timeline is a consolidated experience designed to capture this activity over time.

We view this as a great communication tool between you and us!

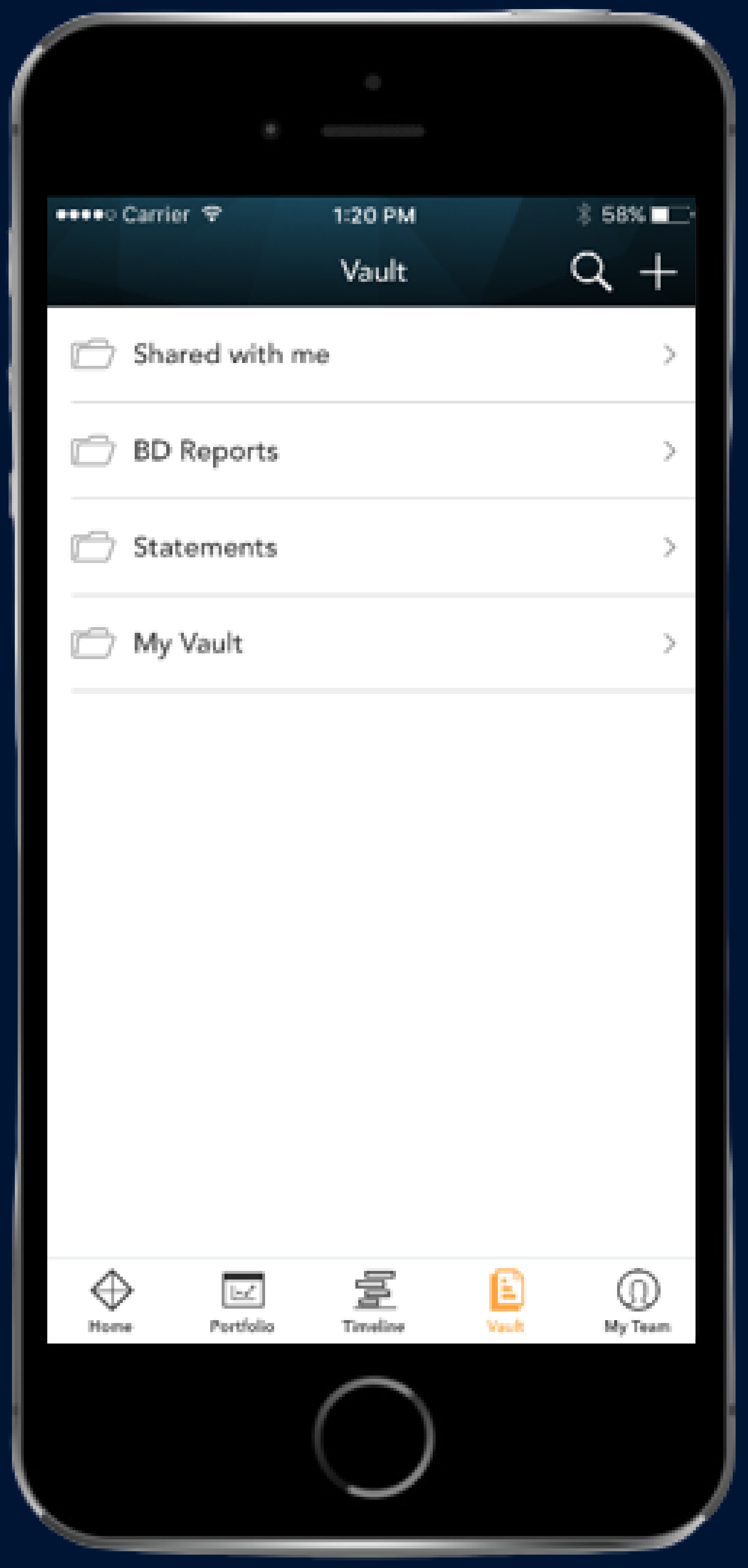


RELATIONSHIP TIMELINE

Search post content and titles



Scroll to see post history



VAULT

EASILY ACCESS OF AND SHARE IMPORTANT FINANCIAL AND LEGAL DOCUMENTS SECURELY

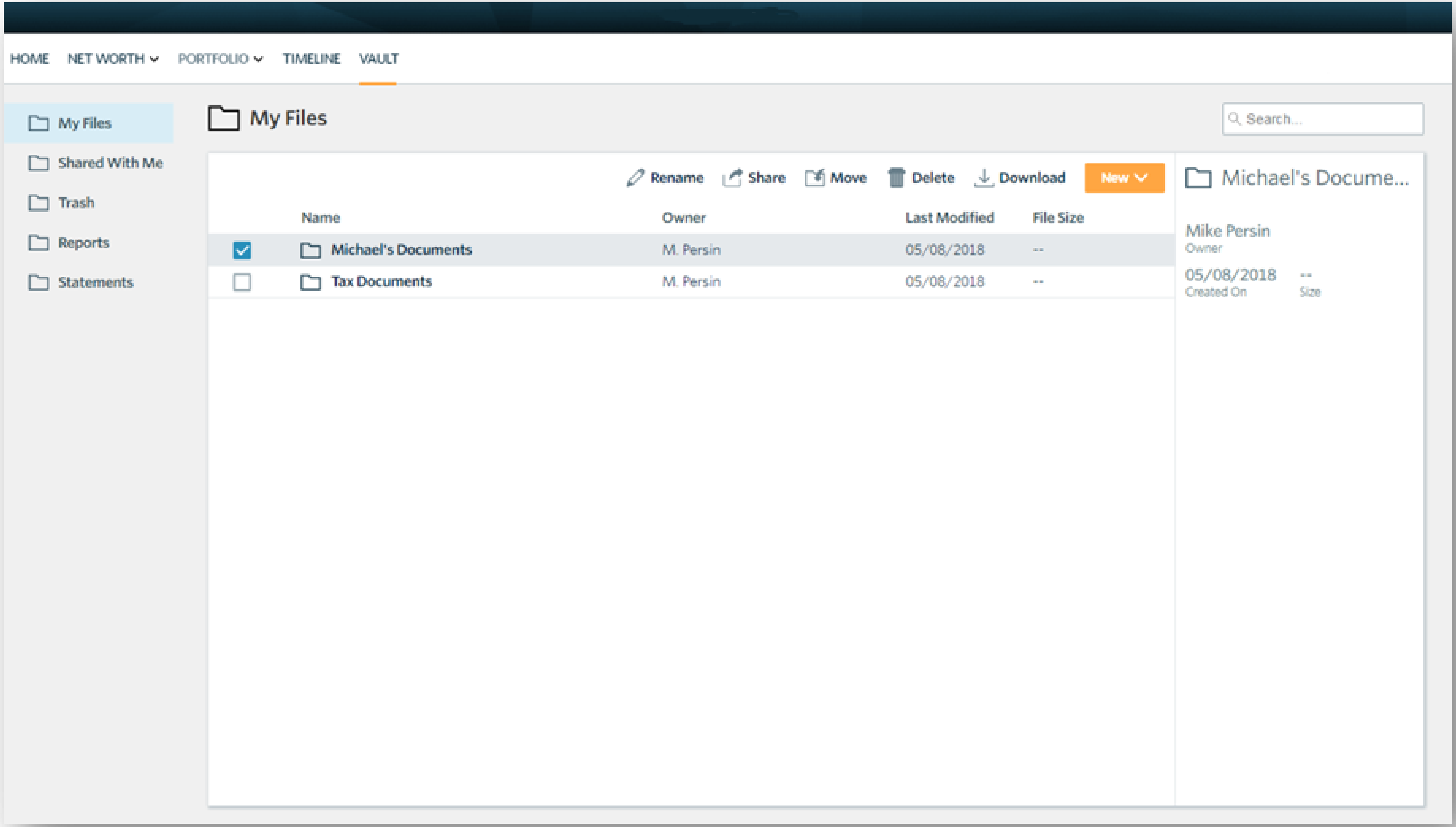
Securely sharing and managing documents is key to working with your wealth management team. The Vault page is where you can keep track of all your important financial and legal documents.

From here, you can organize your documents into folders, drag-and-drop to upload new documents, and easily move files from one folder to another.

The Vault is also an area where we can share documents with each other through the Shared Folders option.

From the Statements and Reports folders, you have quick access to view investment focused reports created by your financial team.

VAULT


HOME
NET WORTH
PORTFOLIO
TIMELINE
VAULT
My Files
Shared With Me
Trash
Reports
Statements
My Files
Search...
Rename
Share
Move
Delete
Download
New
Name
Owner
Last Modified
File Size
Michael's Documents
M. Persin
05/08/2018
--
Tax Documents
M. Persin
05/08/2018
--
Michael's Docume...
Mike Persin
Owner
05/08/2018
Created On
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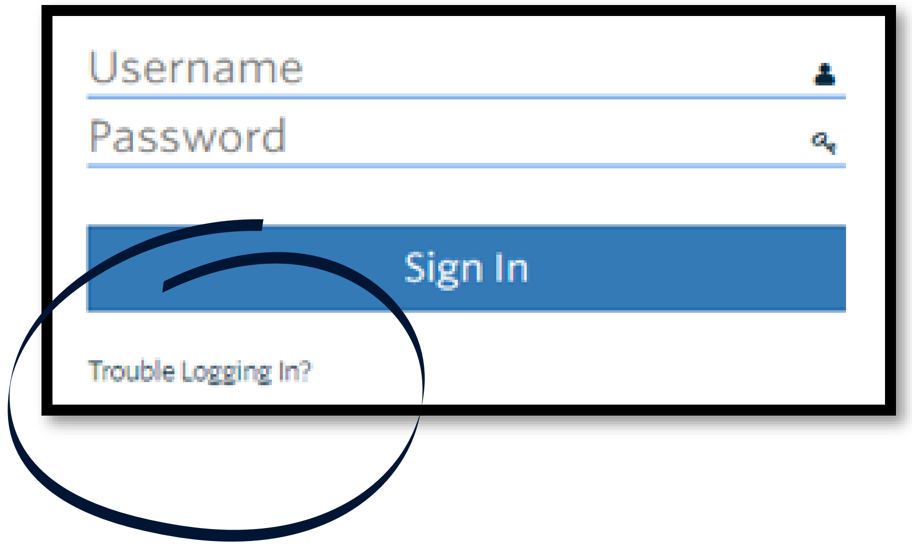
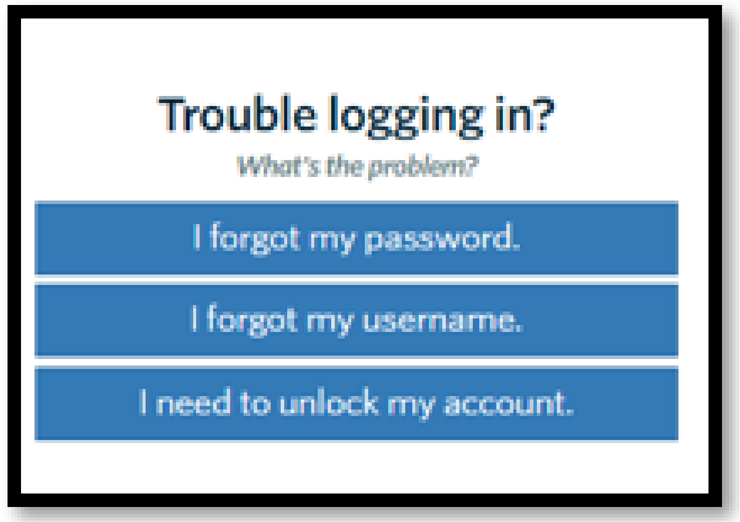
Size

LOGIN ISSUES?

HOW TO ACCESS YOUR ACCOUNT IF YOU HAVE TROUBLE SIGNING IN

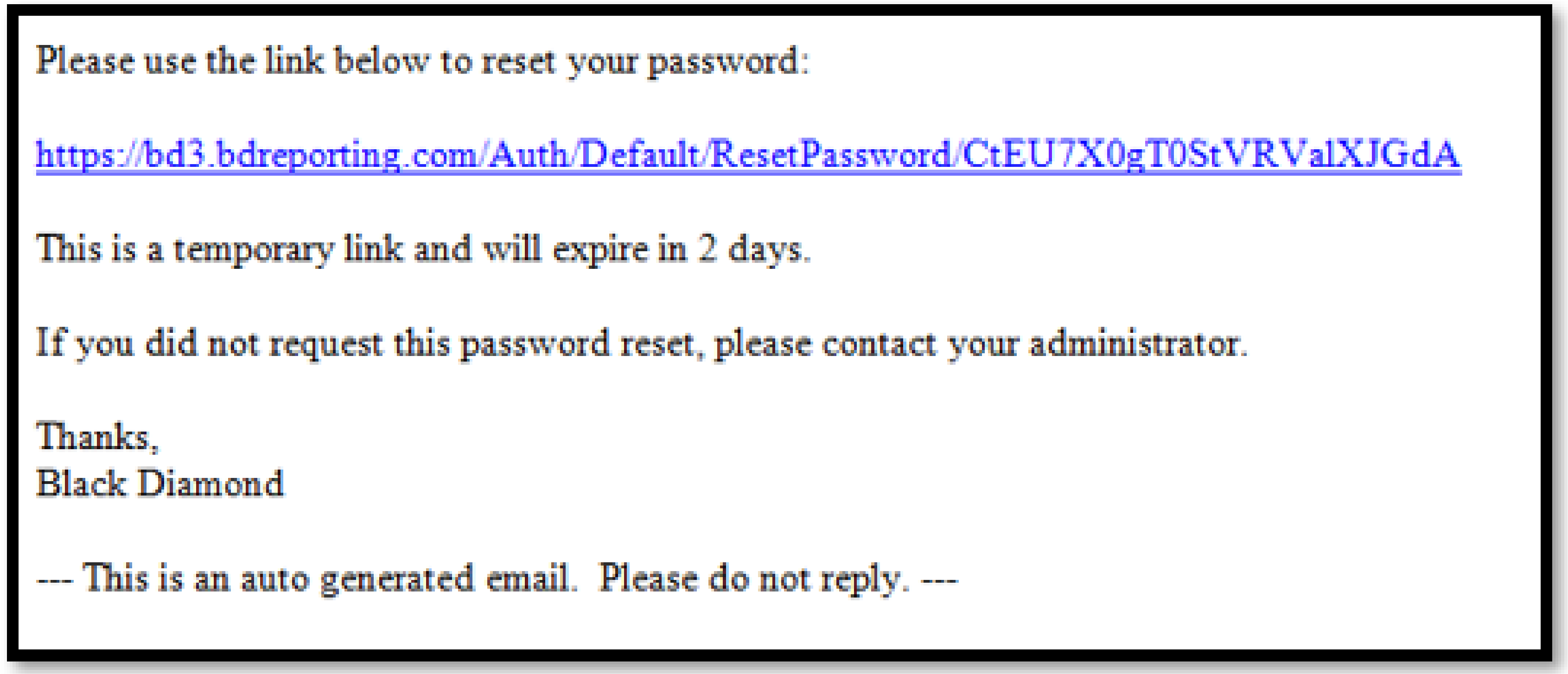


Select “Trouble logging in?” on the sign-in page for help



You will receive an email with a link to access the site

Follow the steps provided to resolve login issues



Please use the link below to reset your password:

https://bd3.bdreporting.com/Auth/Default/ResetPassword/CtEU7X0gT0StVRValXJGdA

This is a temporary link and will expire in 2 days.

If you did not request this password reset, please contact your administrator.

Thanks,
Black Diamond

--- This is an auto generated email. Please do not reply. ---

MOBILE APPLICATION

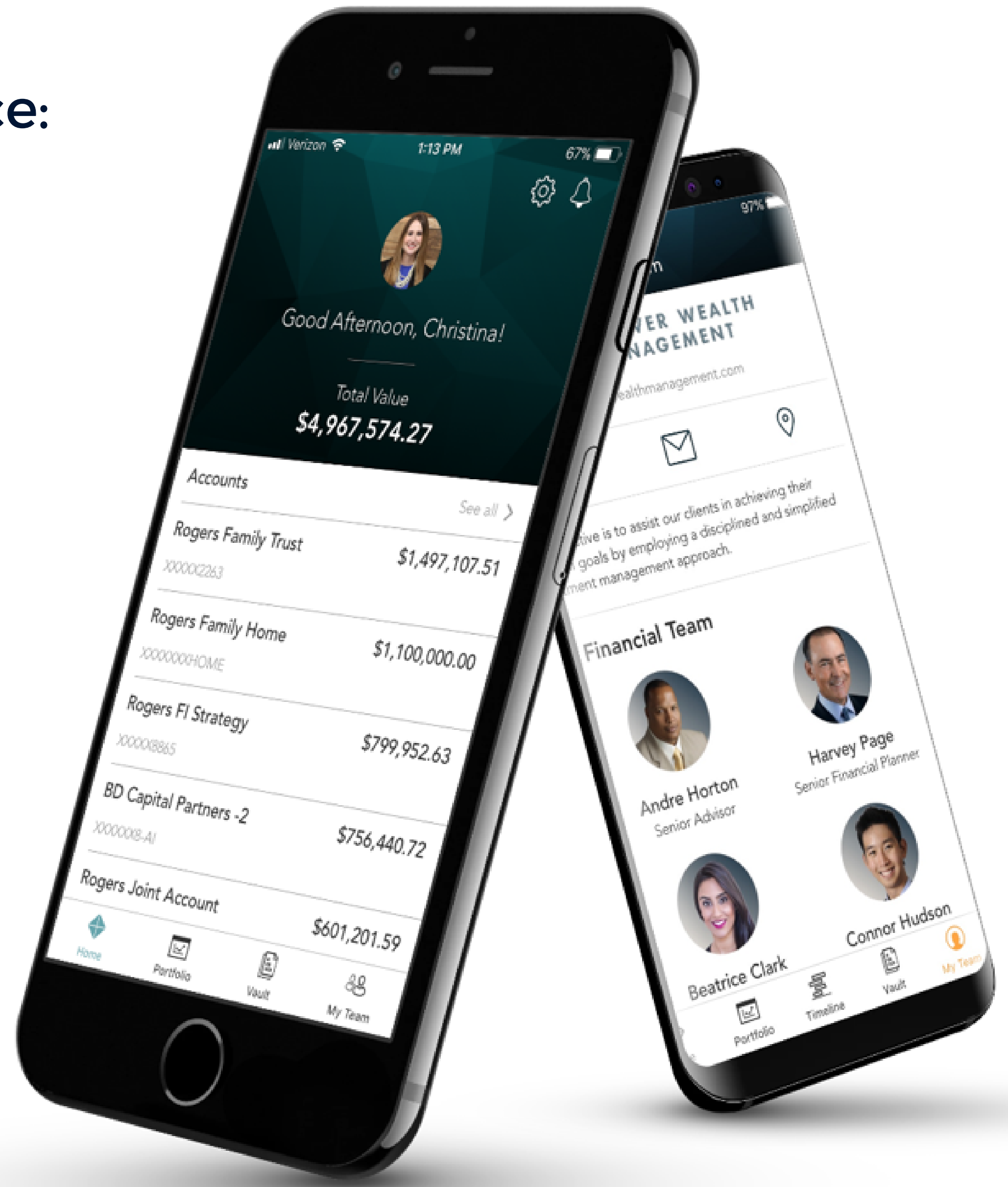
DOWNLOAD THE CLIENT EXPERIENCE FROM THE APPLE APP STORE OR GOOGLE PLAY

Please click on the below link to download the Black Diamond app for your device:

https://apps.apple.com/us/app/black-diamond-wealth-platform/id1326892984

https://play.google.com/store/apps/details?id=com.bdmobile&hl=en_US

Touch Icon



FINANCIAL FORUM

If you have any questions, please contact us. We are always here for you!

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