

**WELCOME TO YOUR PERSONAL  
FINANCIAL PORTAL**



## Stay Connected to Your Financial Picture

### Home Page

At-a-glance view of pertinent account information

### Portfolio

Dynamic view of your entire portfolio

### Vault

Easily keep track of and share your important financial and legal documents

### My Accounts

Detailed list of your accounts

### Login Questions

Helpful hints

# Home Page

View notifications from your advisor

MIKE DEMO TEAM

HOME MY ACCOUNTS PORTFOLIO ▼ VAULT

Back to Home MIKE ▼

Good Afternoon, Mike!

Total Value  
\$32,879,951.64

Investment Accounts

test account - XXXXXXXX6726	\$0.00
XXXXXXXXXX6726	
test account - XXXXXXXX0909	\$0.00
XXXXXXXXXX0909	
test account - XXXXXXXX4724	\$0.00
XXXXXXXXXX4724	

Brokerage Accounts

Williams Trust - PIMCO - XXXXX2303	\$9,532,896.85
XXXXX2303	
Trust Account	
Williams Foundation - XXXX7621	\$6,436,044.19
XXXX7621	
Williams Rev Trust - XXXXX5416	\$3,600,058.85
XXXXX5416	

401k Accounts

Williams Managed Growth Fund - XXXXX2968	\$1,703,995.18
XXXXX2968	
IRA Accounts	
BD CAPITAL PARTNERS - XXXXX6-AI	\$1,080,322.00
XXXXXX6-AI	

dlk INVESTMENT MANAGEMENT

info@deliver.com  
1 (800) 555-5555  
9000 Southside Blvd, Suite 7500, Jacksonville, FL, 32256

About Us  
Our objective is to assist our clients in achieving their financial goals by employing a disciplined and simplified investment management approach.

My Financial Team

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Financial Analyst  
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Top Holdings

Updated Name	\$864,881
DIAMOND REAL ESTATE PARTNE...	\$234,888

External Links

- Investor Information
- Integrations
- Client Testimonials

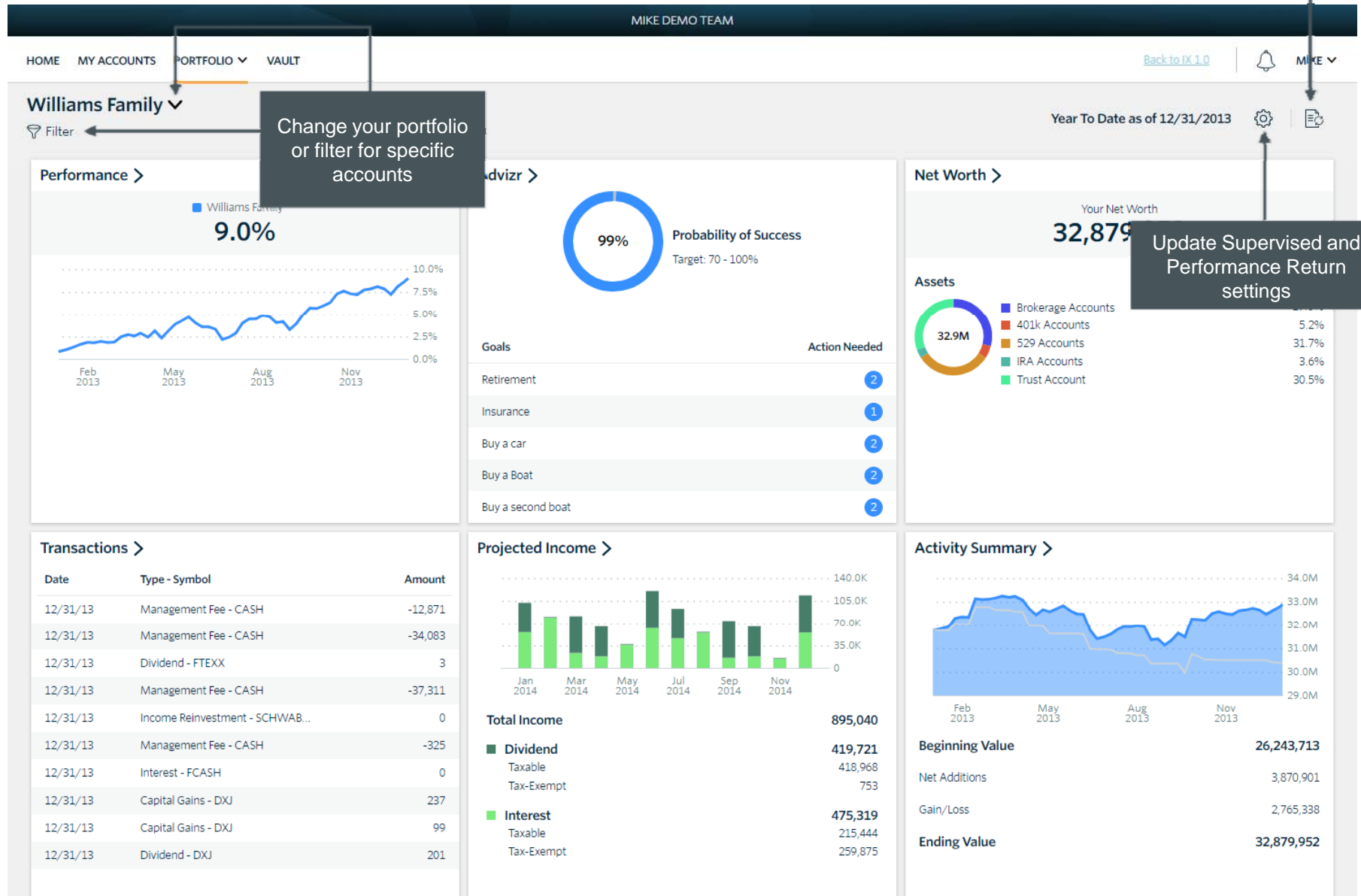
Update your account settings

Communicate or schedule an appointment with your financial team directly

View your top holdings at a glance

# Portfolio

Run Reports directly from your portal



# Vault

Securely store documents/files, share items with your financial team, view generated reports and custodial statements

HOME

MY ACCOUNTS

PORTFOLIO

VAULT

MIKE DEMO TEAM

Back to IX 1.0

MIKE

My Files

Shared With Me

Trash

Reports

Statements

My Files

Rename

Share

Move

Delete

Download

New

	Name	Owner	Last Modified	File Size
<input checked="" type="checkbox"/>	Michael's Documents	M. Persin	05/08/2018	--
<input type="checkbox"/>	Tax Documents	M. Persin	05/08/2018	--

Michael's Docume...

Mike Persin  
Owner  
05/08/2018  
Created On  
--  
Size

Drag and drop your files into the document space to upload

Quickly edit, move or download your files as needed

# My Accounts

HOME

MY ACCOUNTS

PORTFOLIO

VAULT

MIKE DEMO TEAM

Back to IX 1.0

MIKE

My Accounts

\$32,879,951.64

Total Value

7 Accounts

6 Added Accounts

0 Accounts that need attention

My Added Accounts: 6

Accounts that are in process are excluded from your Account Total Value. Added Accounts may take 24-48 hours to appear in your portfolio

Account Number	Account Name	Custodian	Value	As Of Date	Last Updated	Status
> XXXXXXXX6726	test account	Test Data ...	726.34	--	04/24/2018	In Process
> XXXXXXXX0909	test account	Test Data ...	6,070.85	--	04/24/2018	In Process
> XXXXXXXX4724	test account	Test Data ...	7,400.72	--	04/24/2018	In Process
> XXXXXXXX3391	test account	Test Data ...	5,123.36	--	05/01/2018	In Process
> XXXXXXXX6523	test account	Test Data ...	1,024.86	--	05/01/2018	In Process
> XXXXXXXX4243	test account	Test Data ...	7,573.62	--	05/01/2018	In Process

Add outside accounts to view your entire financial picture from one secure location

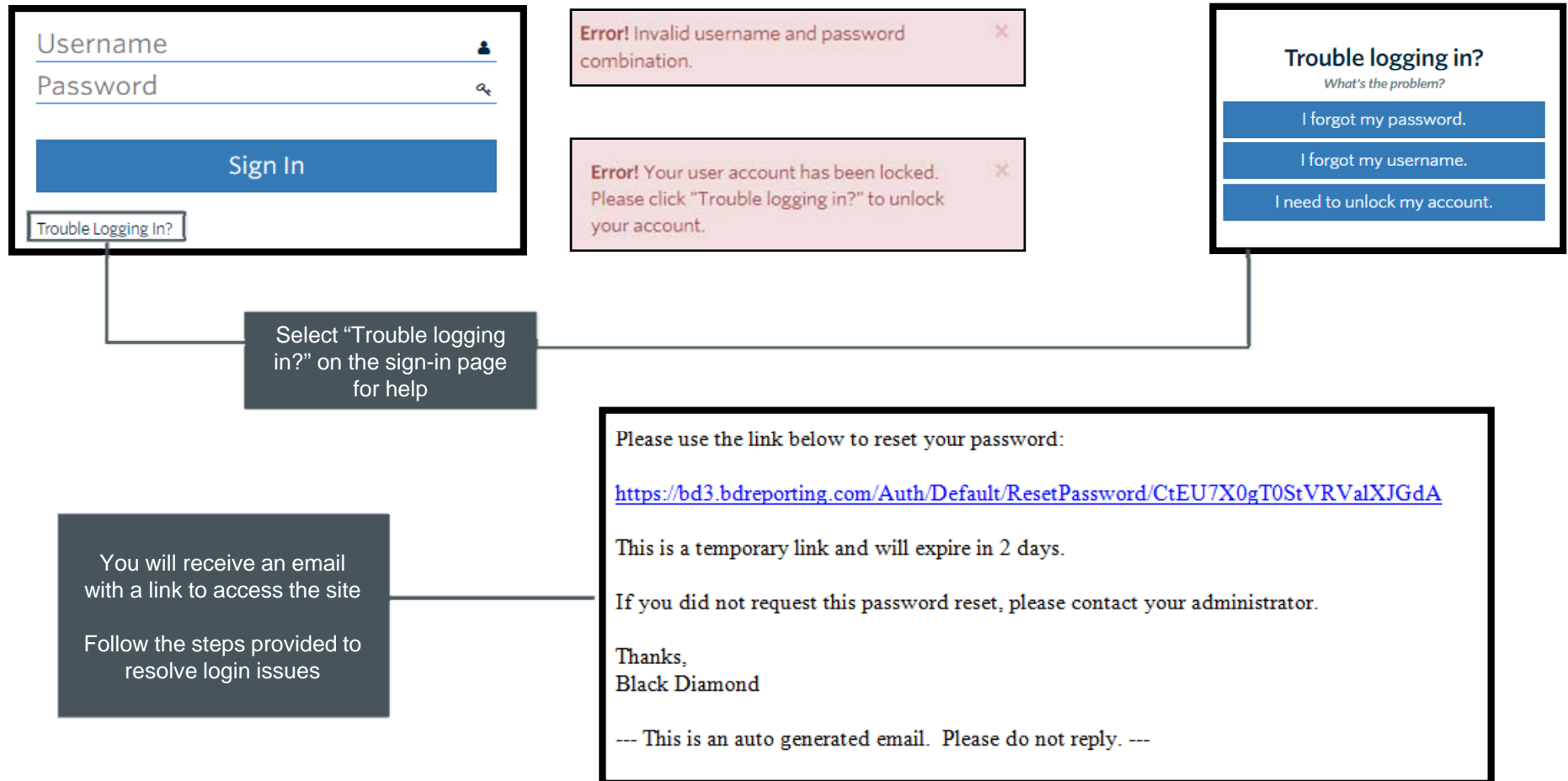
Collapse All

Click on accounts to view holding level detail

Quickly see the status of your linked accounts and manage your account credentials

# Login Problems

How to access your account if you have trouble signing in to the site





# Mobile Application

Download the Client Experience from the Apple App Store or Google Play

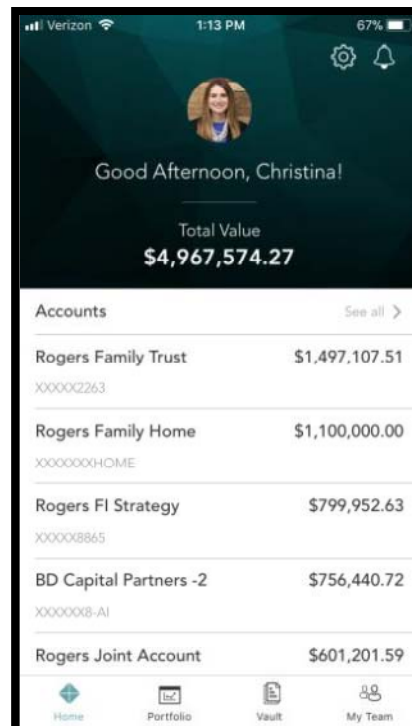
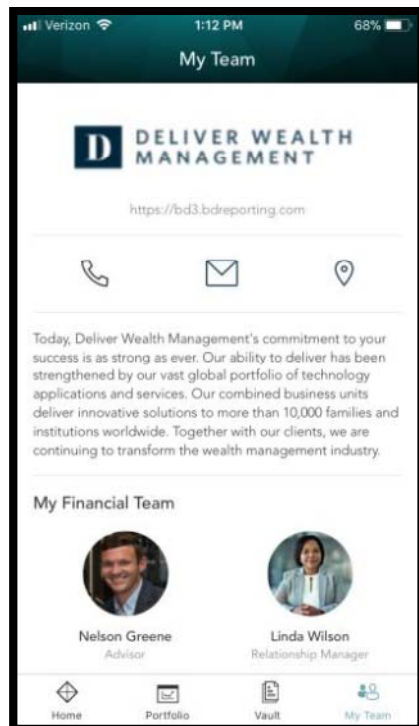
Please click on the below link to download the Black Diamond app for your device:



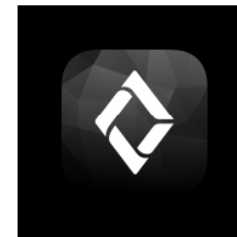
<https://itunes.apple.com/us/app/black-diamond-wealth-platform/id1326892984?mt=8>



[https://play.google.com/store/apps/details?id=com.bdmobile&hl=en\\_US](https://play.google.com/store/apps/details?id=com.bdmobile&hl=en_US)



Touch Icon







Your personalized portal keeps you connected to your financial life,  
your advisory team, and everything else you need  
for managing your wealth.



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

**Brian Johnson**  
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