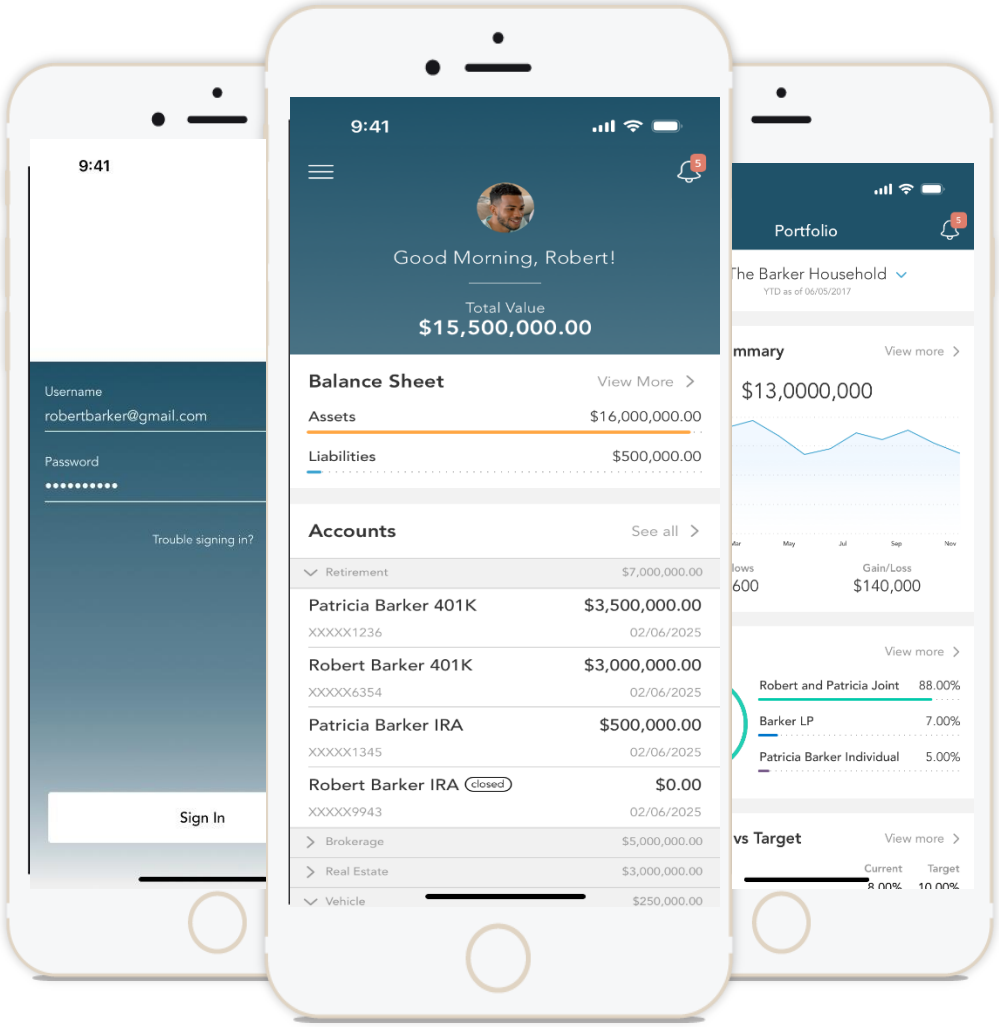
Welcome to
Your Personal
Financial Portal

Personalized For You

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



Stay Connected to Your Financial Picture

Home Page	At-a-glance view of pertinent account information
Net Worth	A detailed list of your accounts and balance sheet report with aggregation capabilities
Portfolio	Dynamic view of your entire portfolio
Login Questions	Helpful hints
Vault	Easily keep track of and share your important financial and legal documents

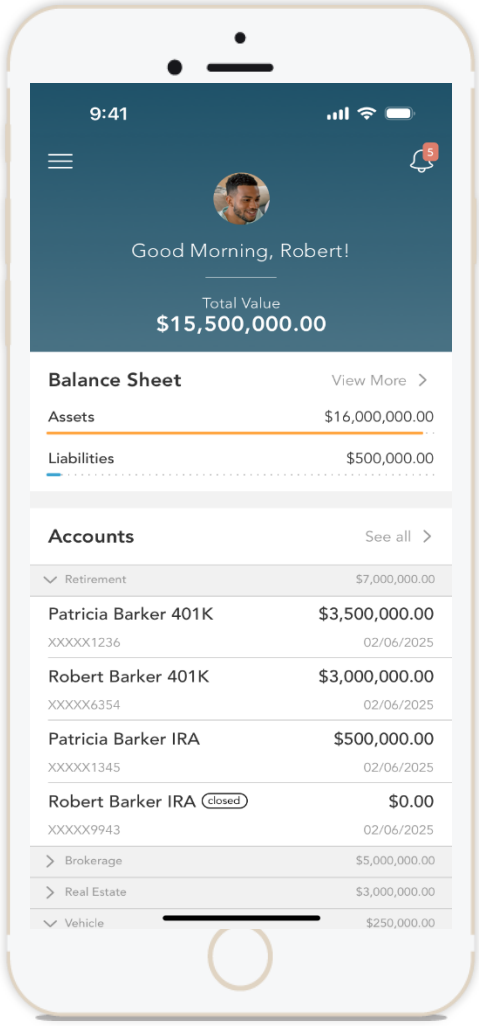
Home Page

When you log in, you'll see your personalized home page. Then, across the top, you have quick access to the other pages of your portal.

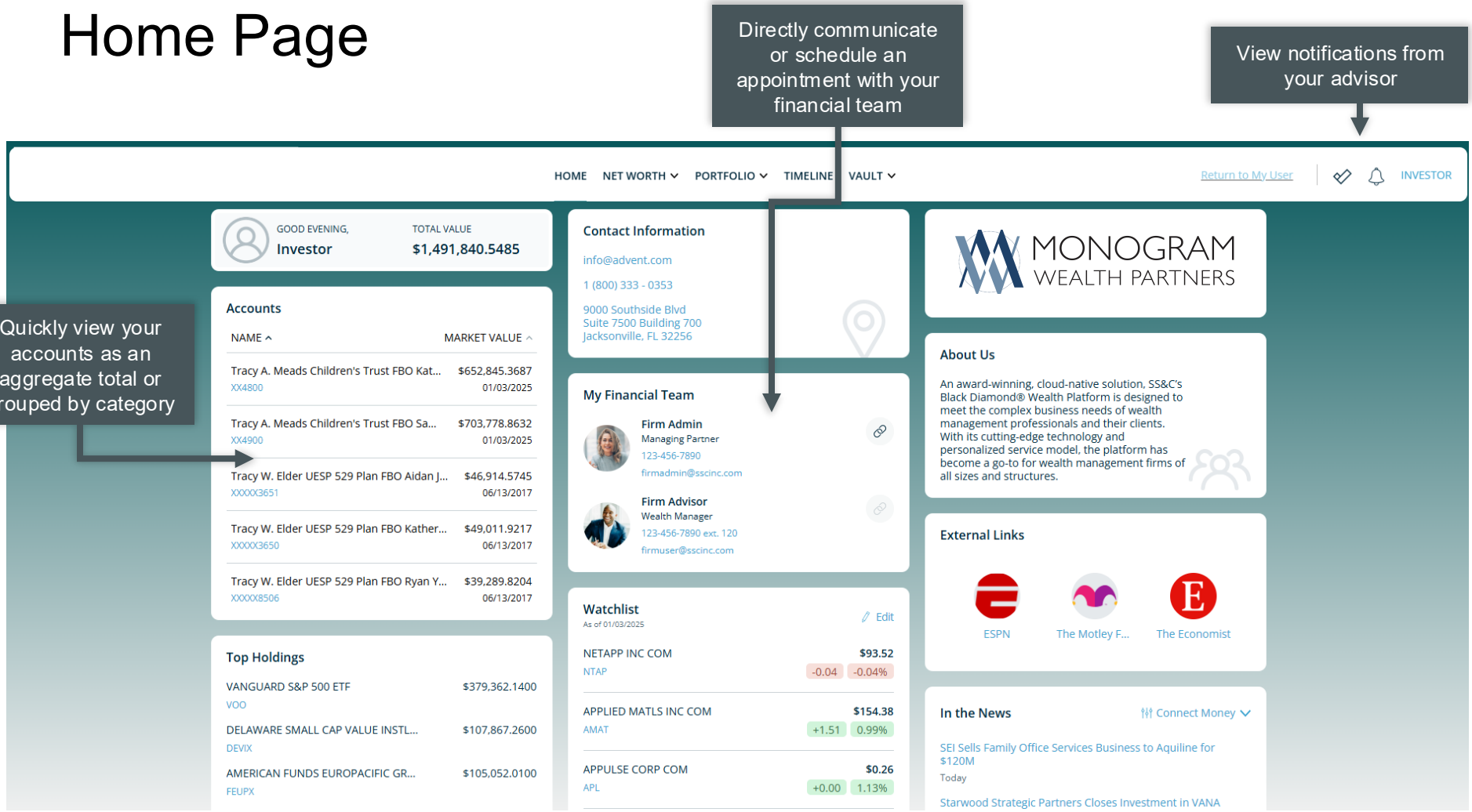
Your accounts and total portfolio value are listed front and center. Next to your accounts, you'll also find your top holdings for quick reference.

You can stay connected to your financial team with clickable links to phone numbers, emails, and office locations.

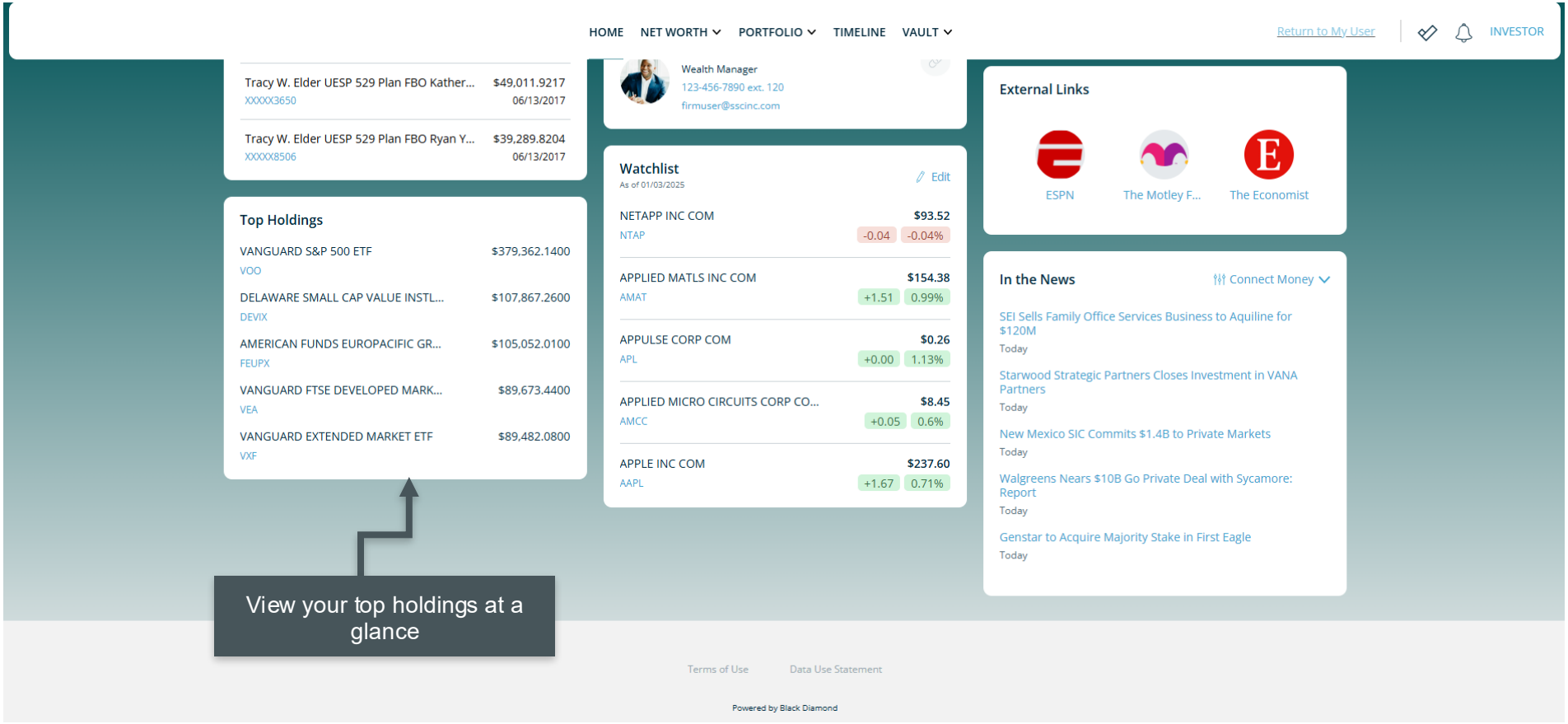
You can also quickly contact your advisor while on the go. In addition to contacting us, we can send communications and updates from your team directly within the portal.



Home Page

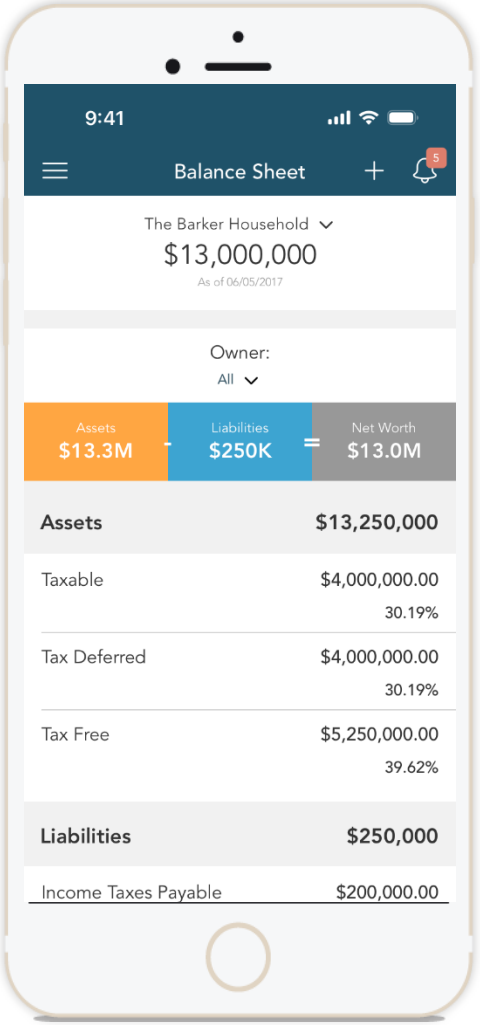

Directly communicate or schedule an appointment with your financial team
View notifications from your advisor
Quickly view your accounts as an aggregate total or grouped by category
HOME
NET WORTH
PORTFOLIO
TIMELINE
VAULT
Return to My User
INVESTOR
GOOD EVENING,
Investor
TOTAL VALUE
$1,491,840.5485
Accounts
NAME
MARKET VALUE
Tracy A. Meads Children's Trust FBO Kat...
XX4800
$652,845.3687
01/03/2025
Tracy A. Meads Children's Trust FBO Sa...
XX4900
$703,778.8632
01/03/2025
Tracy W. Elder UESP 529 Plan FBO Aidan J...
XXXXX3651
$46,914.5745
06/13/2017
Tracy W. Elder UESP 529 Plan FBO Kather...
XXXXX3650
$49,011.9217
06/13/2017
Tracy W. Elder UESP 529 Plan FBO Ryan Y...
XXXXX8506
$39,289.8204
06/13/2017
Top Holdings
VANGUARD S&P 500 ETF
VOO
$379,362.1400
DELAWARE SMALL CAP VALUE INSTL...
DEVIX
$107,867.2600
AMERICAN FUNDS EUROPACIFIC GR...
FEUPX
$105,052.0100
Contact Information
info@advent.com
1 (800) 333 - 0353
9000 Southside Blvd
Suite 7500 Building 700
Jacksonville, FL 32256
My Financial Team
Firm Admin
Managing Partner
123-456-7890
firmadmin@sscinc.com
Firm Advisor
Wealth Manager
123-456-7890 ext. 120
firmuser@sscinc.com
Watchlist
As of 01/03/2025
Edit
NETAPP INC COM
NTAP
$93.52
-0.04
-0.04%
APPLIED MATLS INC COM
AMAT
$154.38
+1.51
0.99%
APPULSE CORP COM
APL
$0.26
+0.00
1.13%
MONOGRAM WEALTH PARTNERS
About Us
An award-winning, cloud-native solution, SS&C's Black Diamond® Wealth Platform is designed to meet the complex business needs of wealth management professionals and their clients. With its cutting-edge technology and personalized service model, the platform has become a go-to for wealth management firms of all sizes and structures.
External Links
ESPN
The Motley F...
The Economist
In the News
Connect Money
SEI Sells Family Office Services Business to Aquiline for $120M
Today
Starwood Strategic Partners Closes Investment in VANA

Home Page Continued…



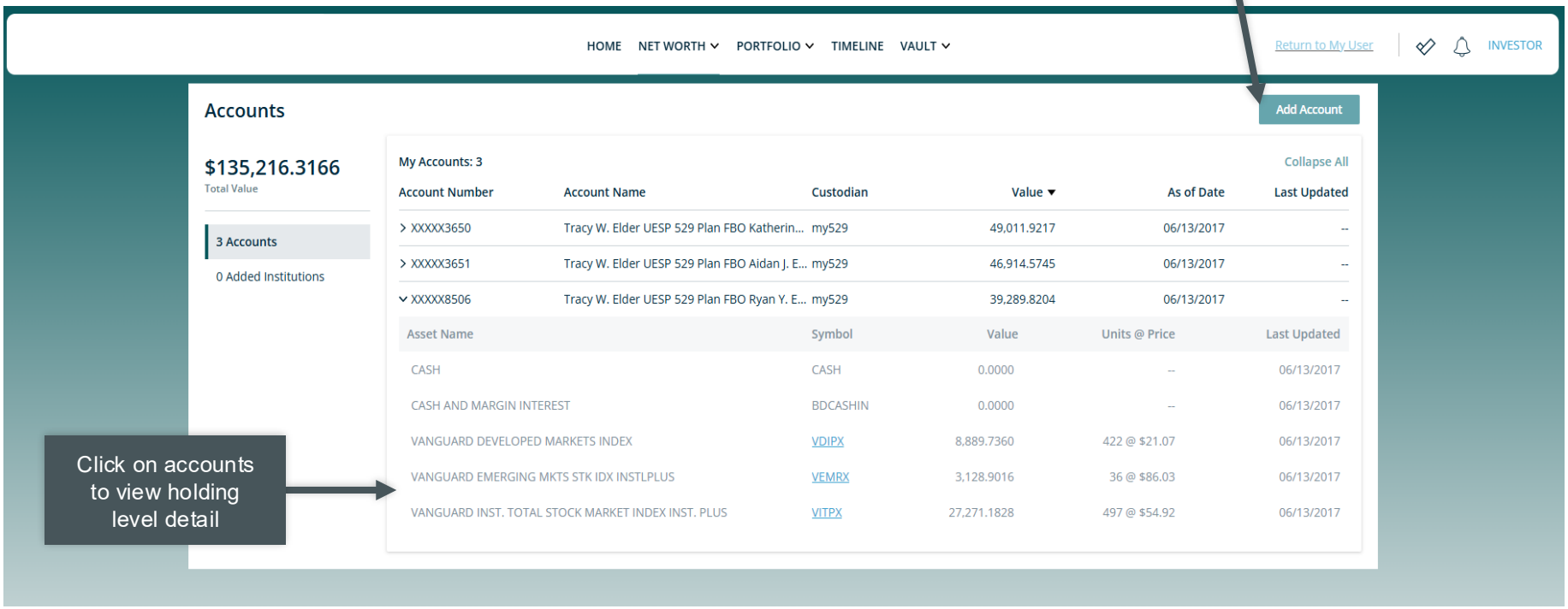
Net Worth

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. Balances and statuses are visible at a glance. In addition, you can expand each account to see your holdings and their values.



My Accounts

From one secure location, add outside or manual accounts to view your entire financial picture



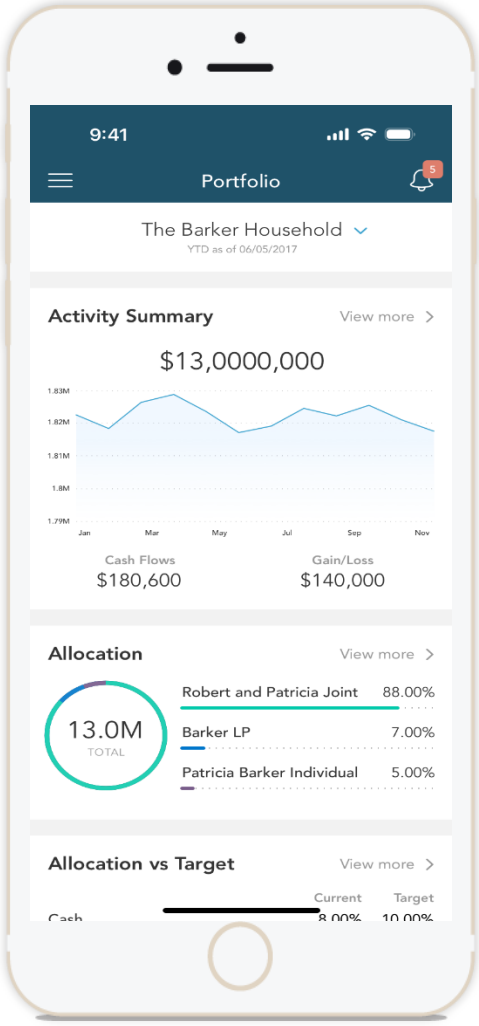
Click on accounts to view holding level detail

Portfolio

The Portfolio dashboard is where you can view additional details about your portfolio. The dashboard gives you a dynamic overview of your portfolio with performance cards highlighting key information about your portfolio.

To get even more detail, you can click on the title of each card. You can also use the drop-down menu to quickly switch between the different cards.

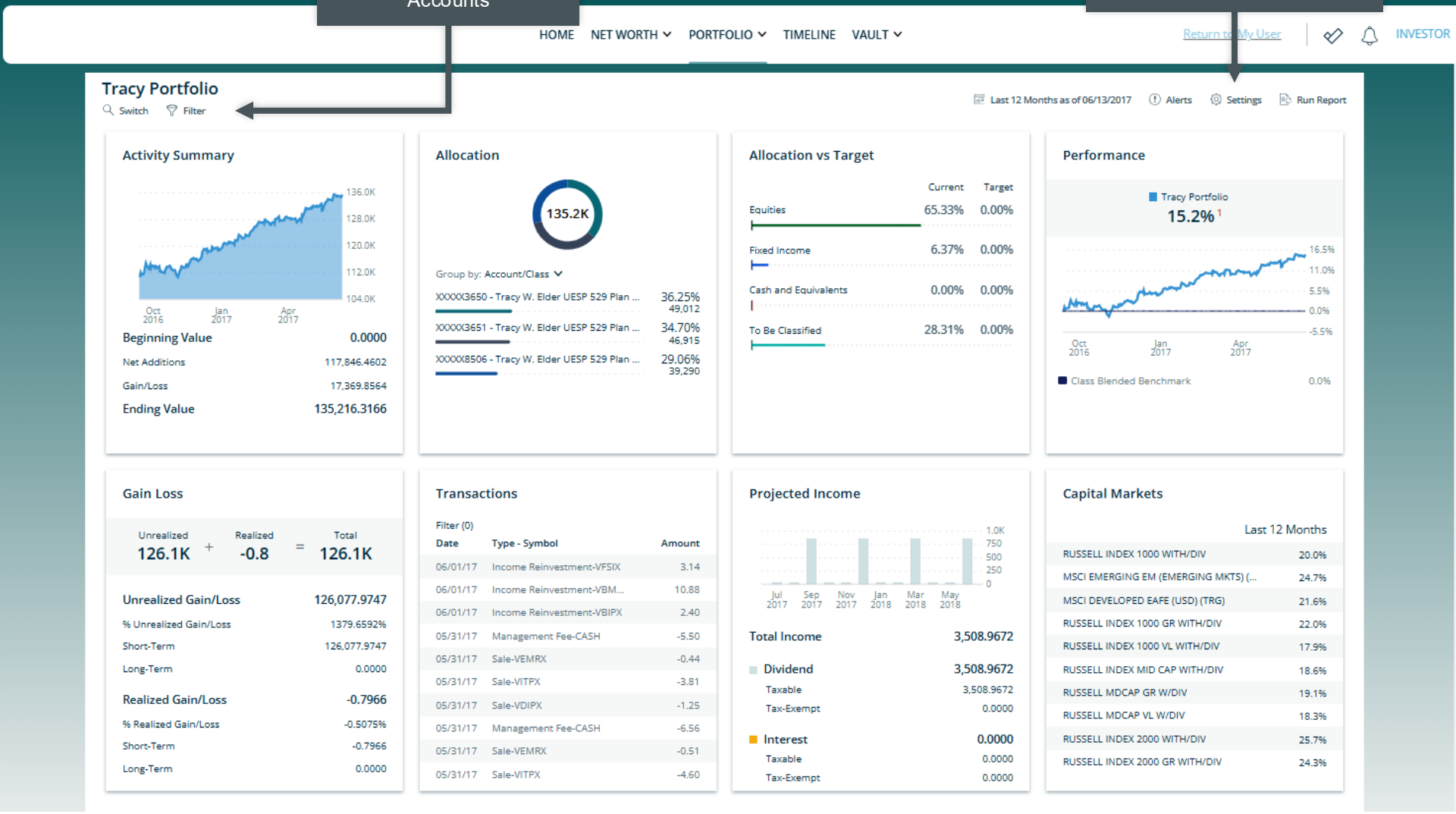
All this information is completely customizable using the filters to select specific date ranges, portfolios, or accounts.



Portfolio

Change the portfolio displayed on the Dashboard or Filter Accounts

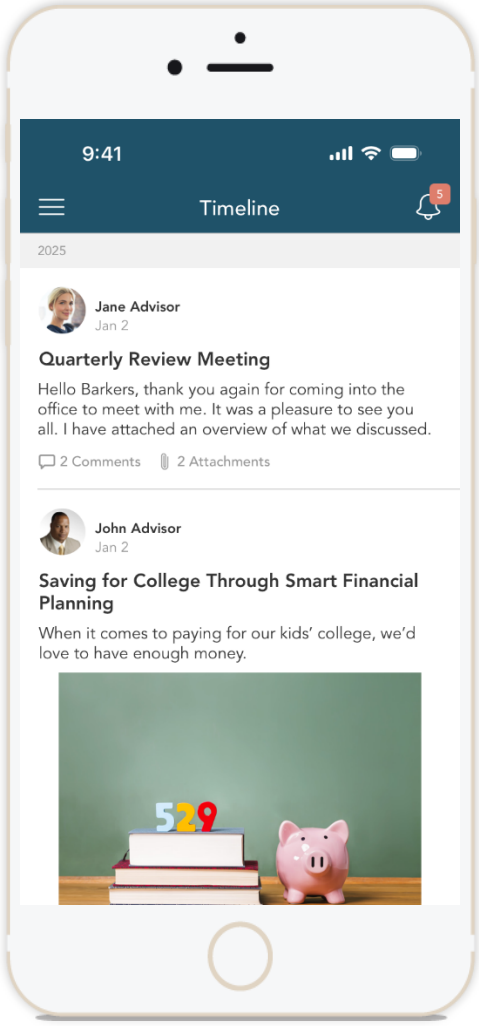
Update Supervised and Performance Return settings



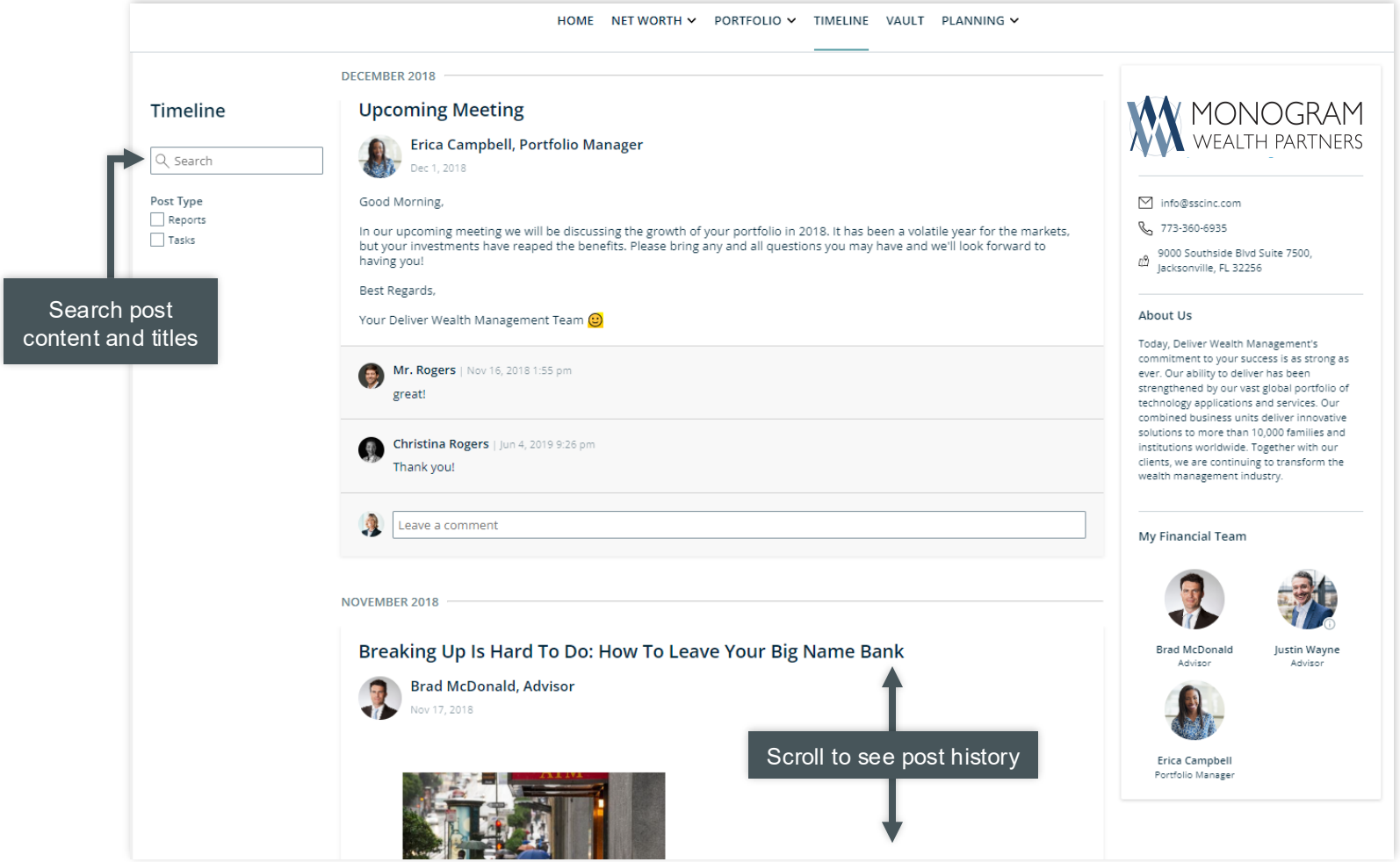
Relationship Timeline

The Relationship Timeline is a consolidated, curated feed of posts designed to memorialize interactions between you and your team. Countless events and activities represent your financial life journey, and Timeline is a consolidated experience designed to capture this activity.

We view this as a great communication tool between you and your financial team.



Relationship Timeline



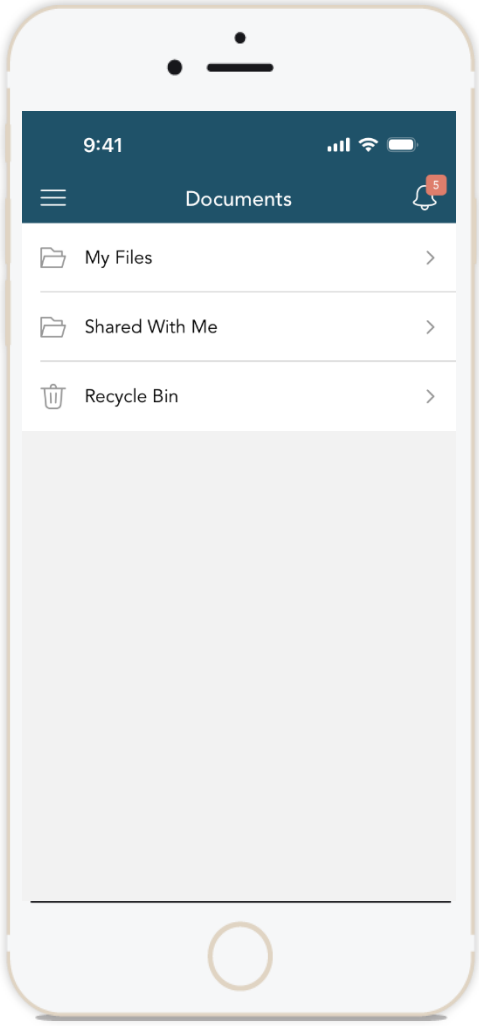
Vault

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.

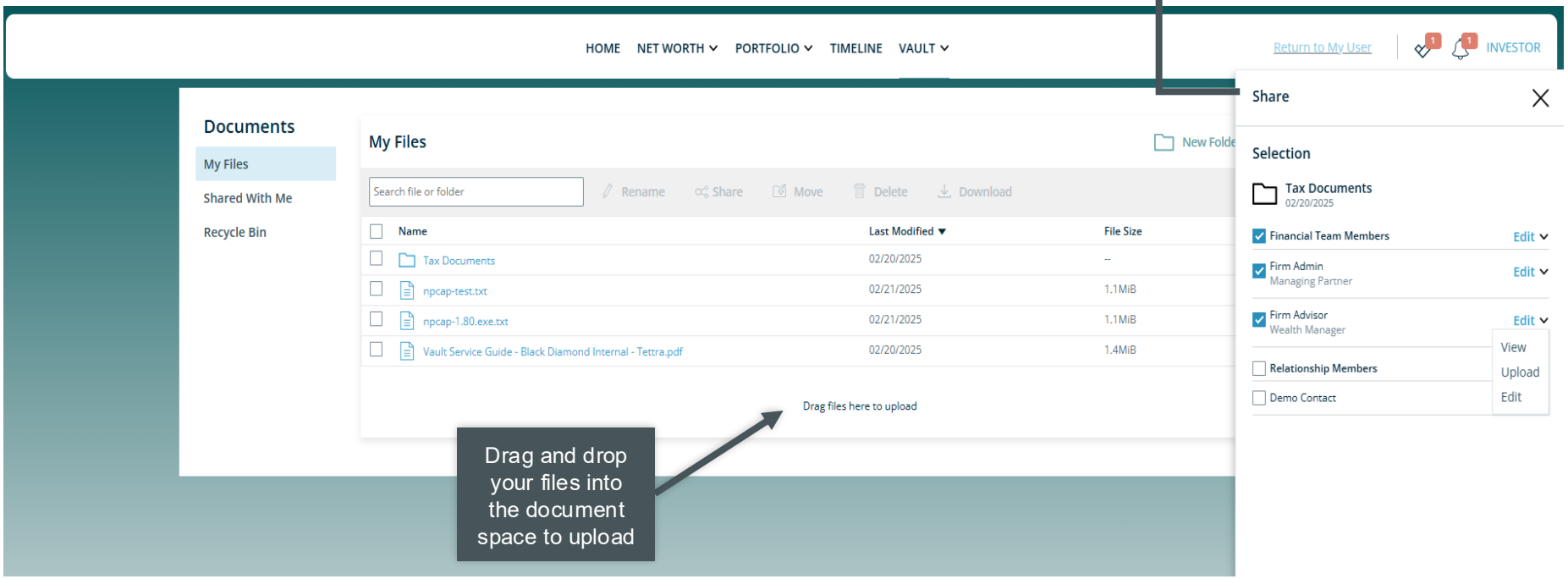
The Vault is also an area where we can share documents through the Shared Folders option.

From the Statements and Reports folders, you can view investment-focused reports created by your financial team.



Vault

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

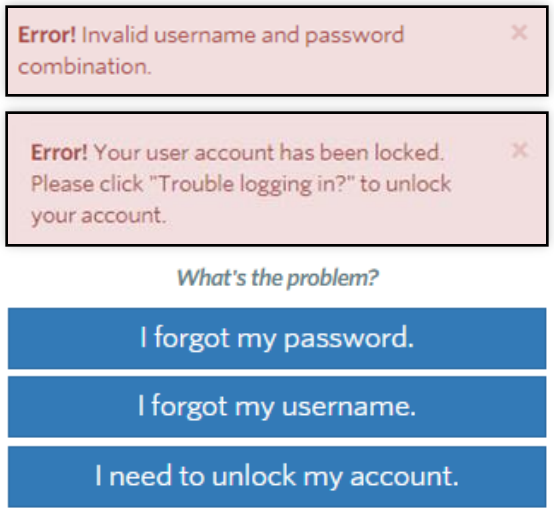


Drag and drop your files into the document space to upload

Login Problems?

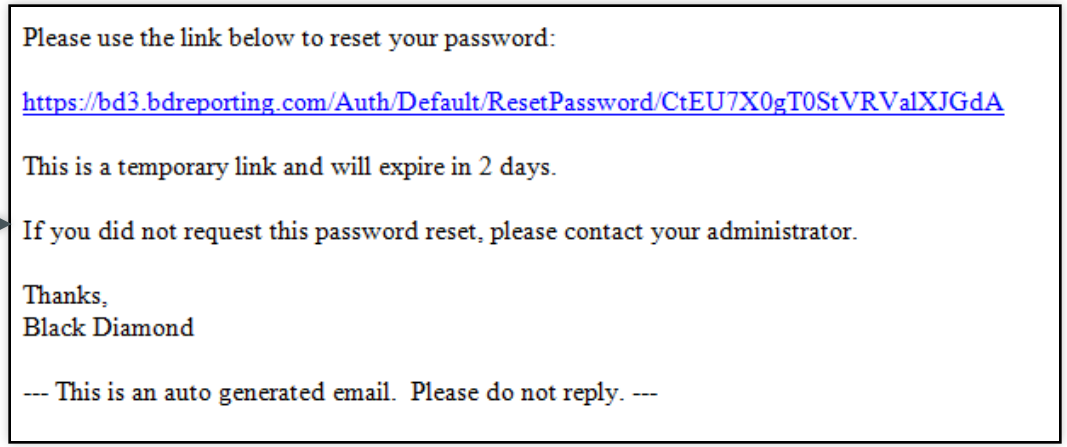
If you're having trouble logging in, please follow the directions below and contact your Advisor if you still need assistance.

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

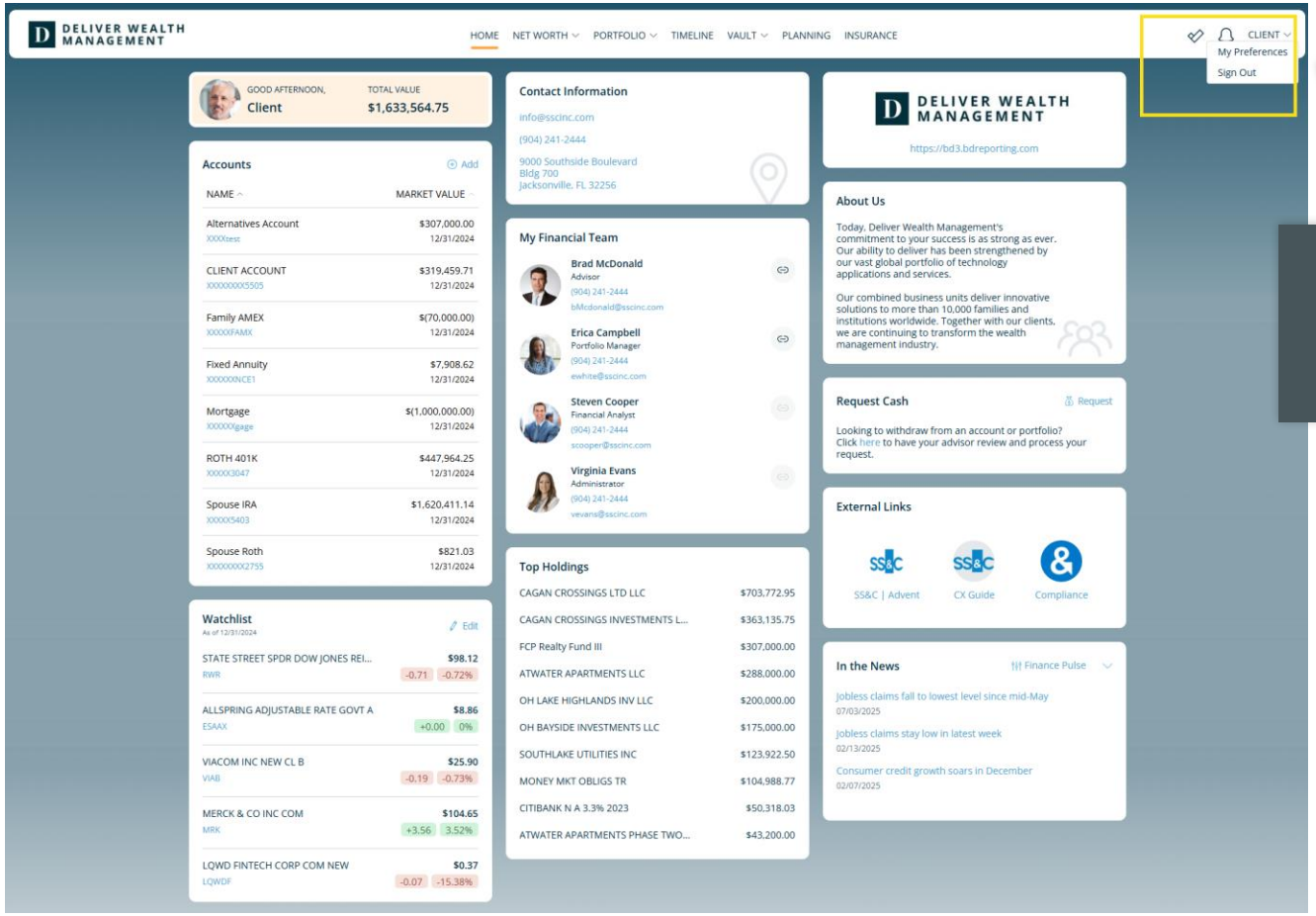
This is a temporary link and will expire in 2 days.

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. ---

Once Logged In, Select “My Preferences”

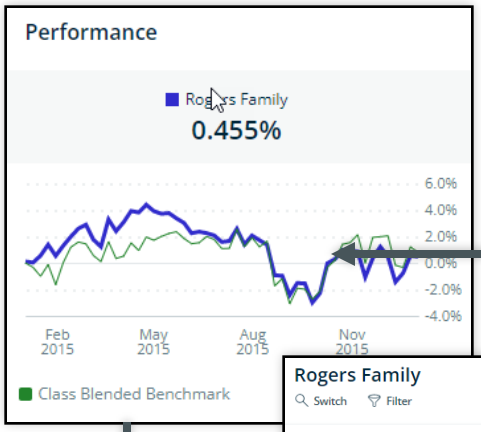


Once successfully logged in, go to Your Name in the upper right-hand corner & select “My Preferences”

Performance Card

View investment performance across your portfolio.

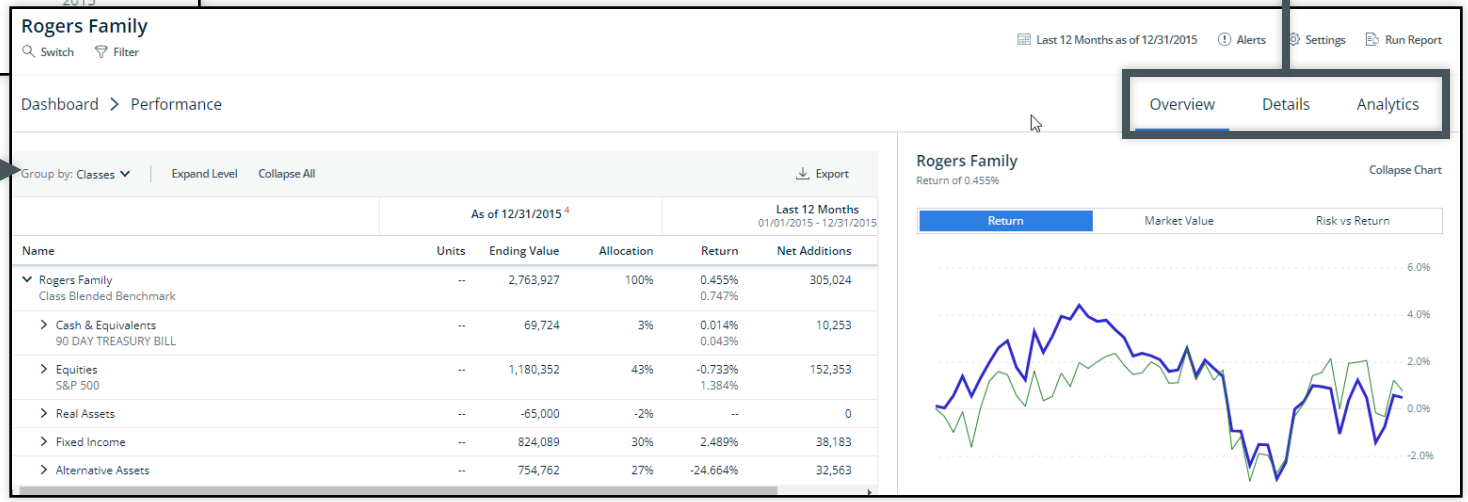
(Consolidated View)



Hover to view returns through a specific date

Change your view to see multiple date ranges or market analytics

Expand and collapse the grouped sections

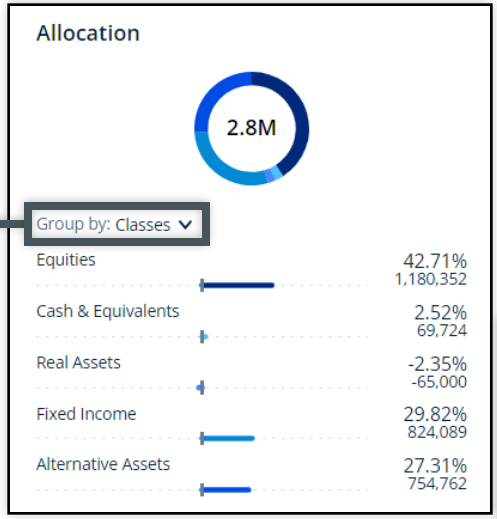


(Expanded View)

Allocation

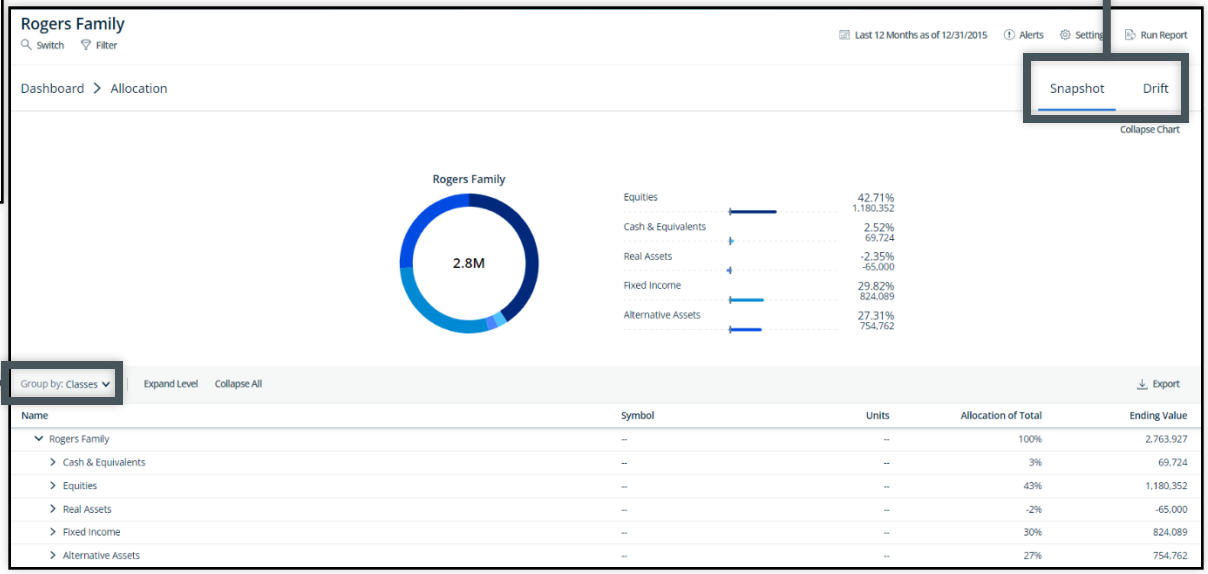
View the allocation breakdown of your portfolio.

(Consolidated View)



Toggle your view between a single day Snapshot and a Drift chart for allocation over time

Change the data grouping from the dashboard or the expanded card

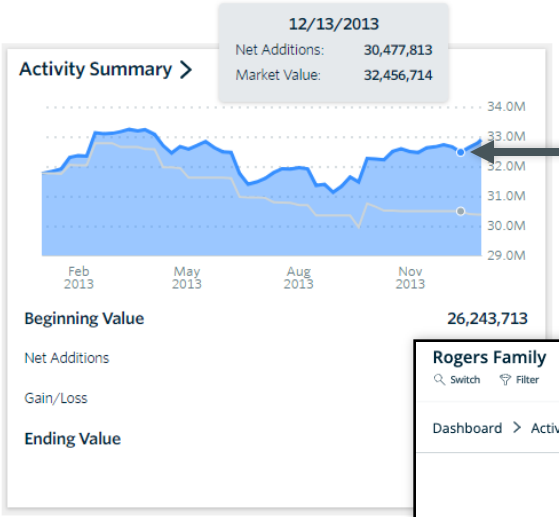


(Expanded View)

Activity Summary

View activity and changes in your portfolio or account balance.

(Consolidated View)



Hover over graph to view net addition and market value information for a specific date

View breakout of additions and withdrawals

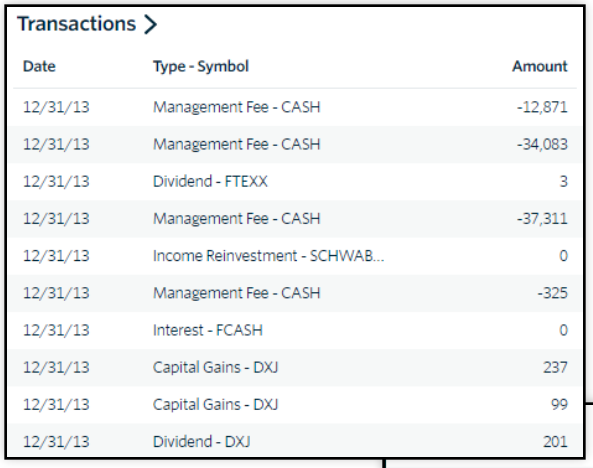
See income and performance breakouts

(Expanded View)

Transactions

View and filter the most recent transactions in your portfolio.

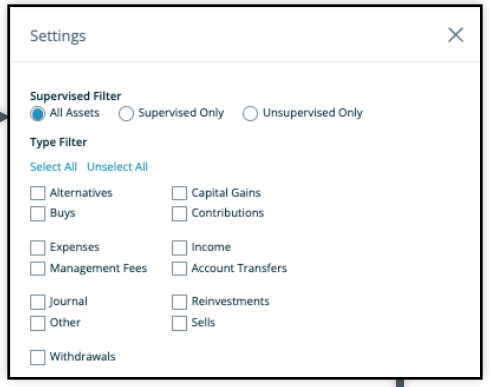
(Consolidated View)



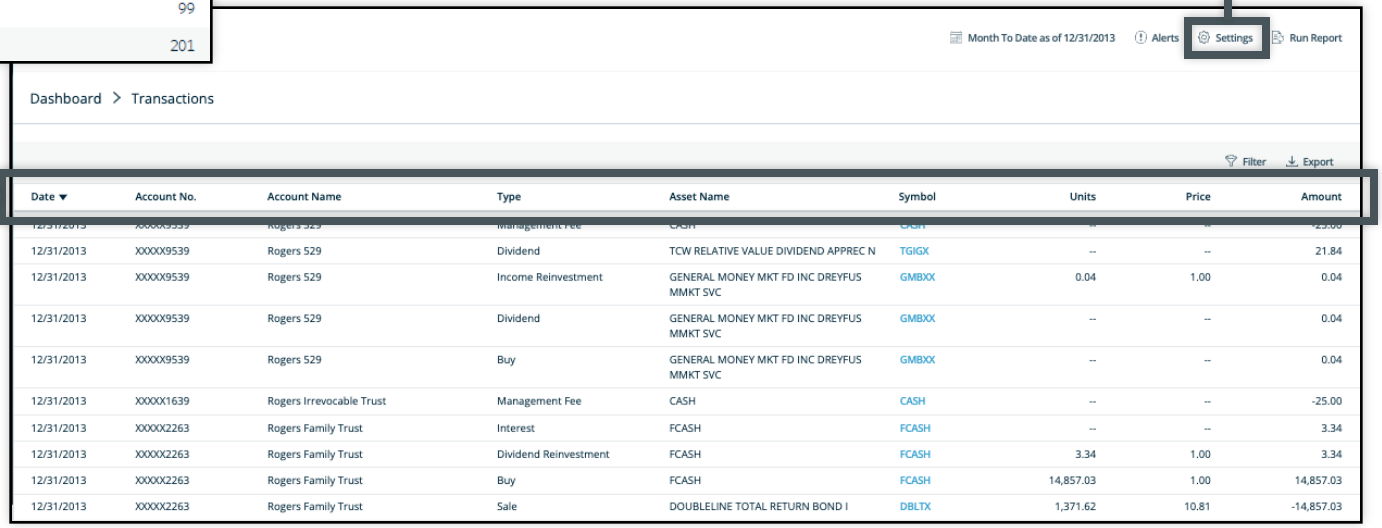
Transactions >

Date	Type - Symbol	Amount
12/31/13	Management Fee - CASH	-12,871
12/31/13	Management Fee - CASH	-34,083
12/31/13	Dividend - FTEXX	3
12/31/13	Management Fee - CASH	-37,311
12/31/13	Income Reinvestment - SCHWAB...	0
12/31/13	Management Fee - CASH	-325
12/31/13	Interest - FCASH	0
12/31/13	Capital Gains - DXJ	237
12/31/13	Capital Gains - DXJ	99
12/31/13	Dividend - DXJ	201

Filter by transaction (available filters are determined by your advisor)



Sort column headers to quickly organize your transactions



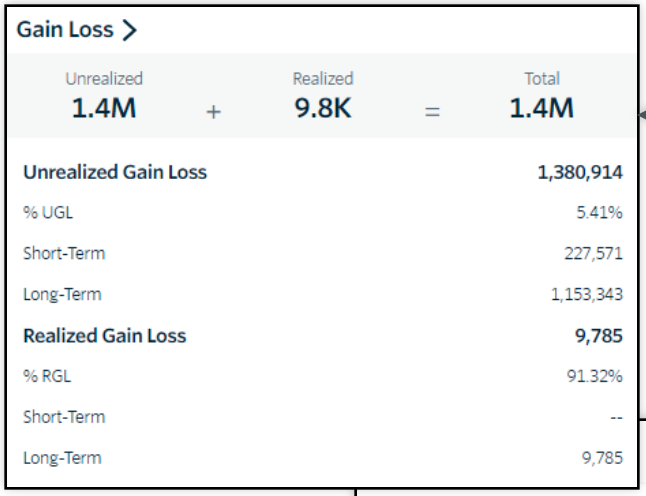
Date	Account No.	Account Name	Type	Asset Name	Symbol	Units	Price	Amount
12/31/2013	XXXXX9539	Rogers 529	Dividend	TCW RELATIVE VALUE DIVIDEND APPREC N	TGIGX	--	--	21.84
12/31/2013	XXXXX9539	Rogers 529	Income Reinvestment	GENERAL MONEY MKT FD INC DREYFUS MMKT SVC	GMBXX	0.04	1.00	0.04
12/31/2013	XXXXX9539	Rogers 529	Dividend	GENERAL MONEY MKT FD INC DREYFUS MMKT SVC	GMBXX	--	--	0.04
12/31/2013	XXXXX9539	Rogers 529	Buy	GENERAL MONEY MKT FD INC DREYFUS MMKT SVC	GMBXX	--	--	0.04
12/31/2013	XXXXX1639	Rogers Irrevocable Trust	Management Fee	CASH	CASH	--	--	-25.00
12/31/2013	XXXXX2263	Rogers Family Trust	Interest	FCASH	FCASH	--	--	3.34
12/31/2013	XXXXX2263	Rogers Family Trust	Dividend Reinvestment	FCASH	FCASH	3.34	1.00	3.34
12/31/2013	XXXXX2263	Rogers Family Trust	Buy	FCASH	FCASH	14,857.03	1.00	14,857.03
12/31/2013	XXXXX2263	Rogers Family Trust	Sale	DOUBLELINE TOTAL RETURN BOND I	DBLTX	1,371.62	10.81	-14,857.03

(Expanded View)

Gain Loss

View realized and unrealized gain/loss information for your investments.

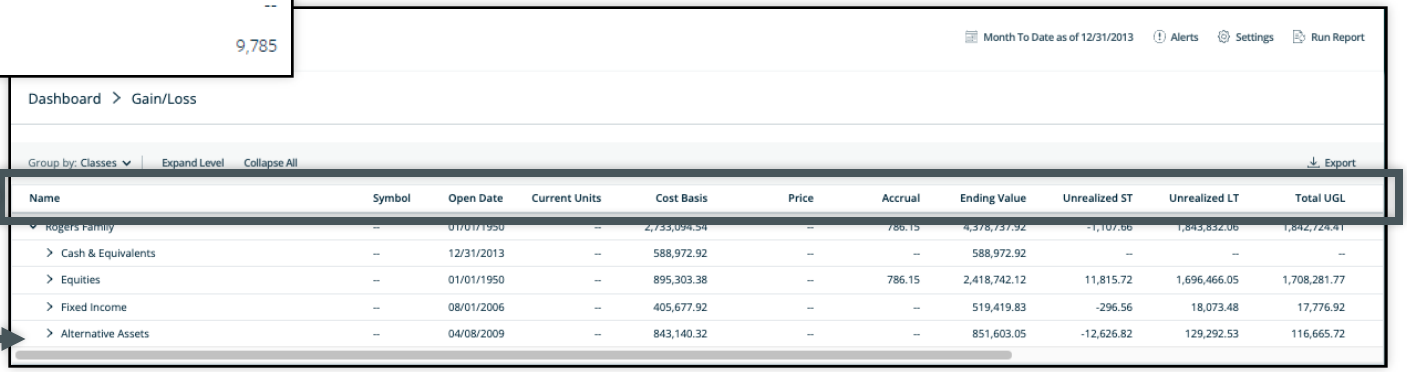
(Consolidated View)



View your high level gain/loss breakdown from the dashboard

Sort column headers to quickly organize your cost basis information

Expand and collapse the grouped sections



(Expanded View)

Mobile Application

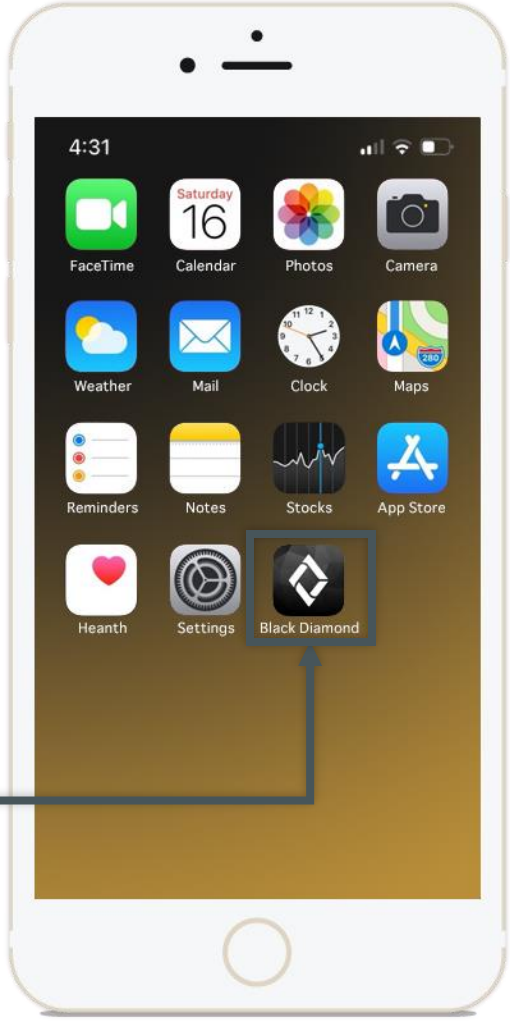
Easily download the Client Experience from the Apple App Store or Google Play.

Click on the appropriate 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&pcampaignid=web_share

Touch Icon



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

MONOGRAM
WEALTH PARTNERS

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

Monogram Wealth Partners
(516) 605-1313