



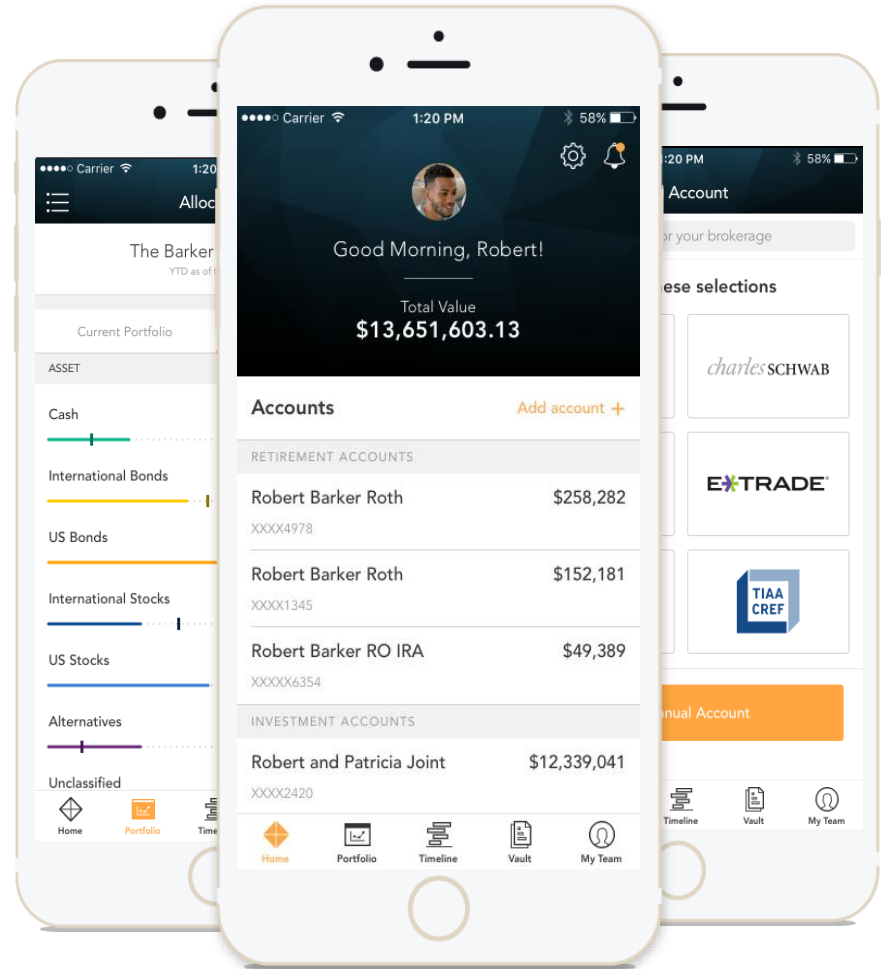
WELCOME TO YOUR PERSONAL  
FINANCIAL PORTAL



TRIUMPH CAPITAL  
PRIVATE WEALTH MANAGEMENT

# 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

My Accounts

Detailed list of your accounts

Portfolio

Dynamic view of your entire portfolio

Vault

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

Login Questions

Helpful hints



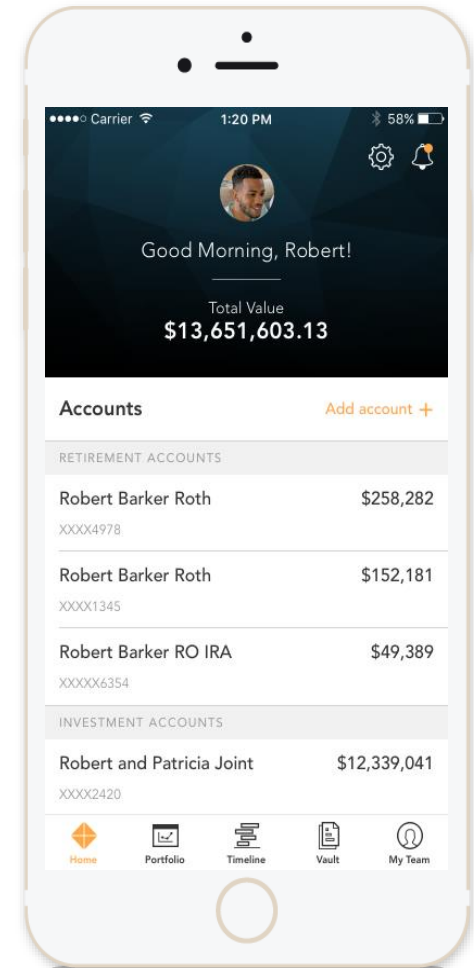
# Home Page

When you log in, you'll see your personalized home page. 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 will send you communications and updates from your team—all directly within the portal.



# Home Page

View notifications from your advisor

The screenshot shows a financial advisor's home page. At the top, a dark blue header contains the text "MIKE DEMO TEAM" and navigation links for "HOME", "MY ACCOUNTS", "PORTFOLIO", and "VAULT". On the right side of the header, there is a "Back" button, a notification bell icon, and a user profile icon labeled "MIKE".

The main content area is divided into two columns. The left column features a large dark blue banner with a profile picture of a man and the text "Good Afternoon, Mike!". Below this banner, the "Total Value" is displayed as "\$32,879,951.64". A callout box points to this section with the text "Quickly view your accounts as an aggregate total or grouped by category".

The left column continues with a list of accounts grouped by category: "Investment Accounts", "Brokerage Accounts", "Trust Account", and "401k Accounts". Each group contains several account entries with their respective values. For example, under "Investment Accounts", there are three "test account" entries, each with a value of "\$0.00". Under "Brokerage Accounts", there is a "Williams Trust - PIMCO" entry with a value of "\$9,532,896.85". Under "Trust Account", there is a "Williams Foundation" entry with a value of "\$6,436,044.19". Under "401k Accounts", there is a "Williams Managed Growth Fund" entry with a value of "\$1,703,995.18".

The right column features the "TRIUMPH CAPITAL PRIVATE WEALTH MANAGEMENT" logo and contact information: "info@deliver.com", "1 (800) 555-5555", and "9000 Southside Blvd, Suite 7500, Jacksonville, FL, 32256". Below this is an "About Us" section and a "My Financial Team" section. The "My Financial Team" section displays four team members with their photos, names, titles, and contact information: Harvey Page (Senior Advisor), Andre Horton (Senior Financial Planner), Beatrice Clark (Tax Advisor), and Connor Hudson (Financial Analyst). A callout box points to this section with the text "Communicate or schedule an appointment with your financial team directly".

Below the team section is a "Top Holdings" section showing two holdings: "Updated Name" with a value of "\$864,881" and "DIAMOND REAL ESTATE PARTNE..." with a value of "\$234,888". A callout box points to this section with the text "View your top holdings at a glance".

At the bottom of the right column is an "External Links" section with three links: "Investor Information", "Integrations", and "Client Testimonials".

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

Update your account settings

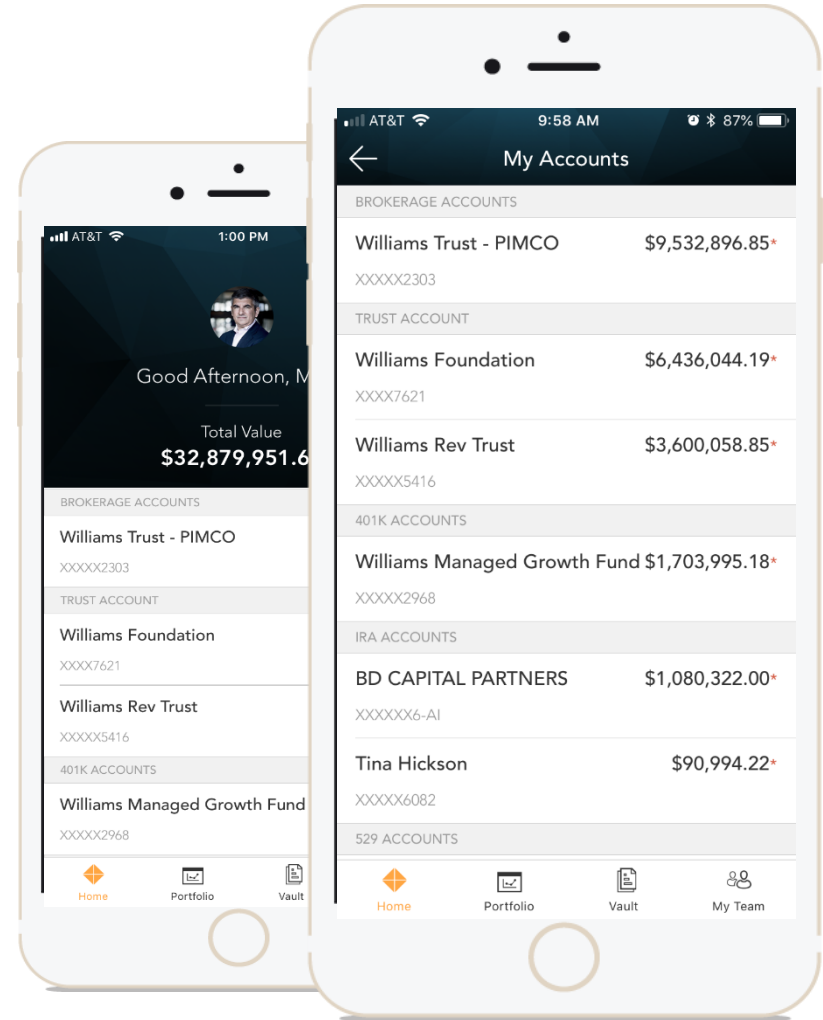
Communicate or schedule an appointment with your financial team directly

View your top holdings at a glance

# My Accounts

On the My Accounts page, you can see a detailed list of your accounts. Balances and statuses are viewable at a glance. You can expand each account to see your holdings and their individual values.

Keep track of their status and updates directly from your portal.



# My Accounts

MIKE DEMO TEAM

HOME MY ACCOUNTS PORTFOLIO VAULT

[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](#) [Collapse All](#)

Click on accounts to view holding level detail

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

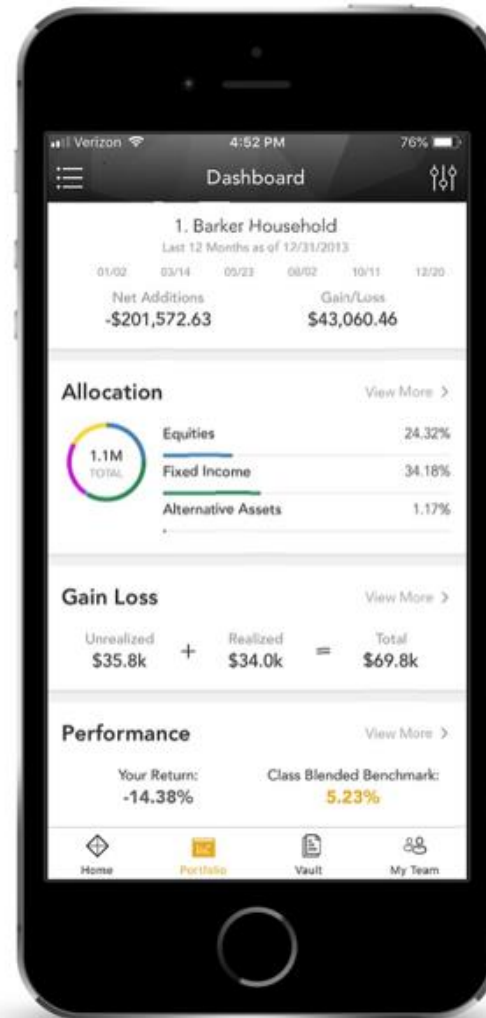
Quickly see the status of your linked accounts and manage your account credentials

# 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 of 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 switch between the different cards quickly.

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



# Portfolio

Run Reports directly from your portal

Change your portfolio or filter for specific accounts

Update Supervised and Performance Return settings

MIKE DEMO TEAM

HOME MY ACCOUNTS **PORTFOLIO** VAULT

Back to iX1.0 | MIKE

Williams Family **Filter** Year To Date as of 12/31/2013

### Performance >

Williams Family **9.0%**

Feb 2013 May 2013 Aug 2013 Nov 2013

### Advisor >

**99%** Probability of Success  
Target: 70 - 100%

Goals	Action Needed
Retirement	2
Insurance	1
Buy a car	2
Buy a Boat	2
Buy a second boat	2

### Net Worth >

Your Net Worth **32,879**

Assets

- 32.9M
- Brokerage Accounts: 5.2%
- 401k Accounts: 31.7%
- 529 Accounts: 3.6%
- IRA Accounts: 30.5%
- Trust Account: 30.5%

### 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

### Projected Income >

Jan 2014 Mar 2014 May 2014 Jul 2014 Sep 2014 Nov 2014

Total Income	Amount
<b>Total Income</b>	<b>895,040</b>
<b>Dividend</b>	<b>419,721</b>
Taxable	418,968
Tax-Exempt	753
<b>Interest</b>	<b>475,319</b>
Taxable	215,444
Tax-Exempt	259,875

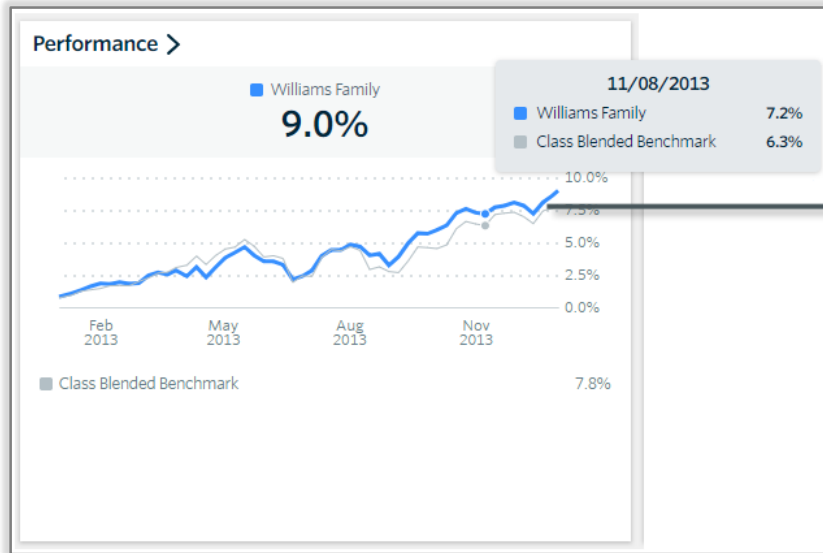
### Activity Summary >

Feb 2013 May 2013 Aug 2013 Nov 2013

<b>Beginning Value</b>	<b>26,243,713</b>
Net Additions	3,870,901
Gain/Loss	2,765,338
<b>Ending Value</b>	<b>32,879,952</b>

# Performance Card

View investment performance across your portfolio

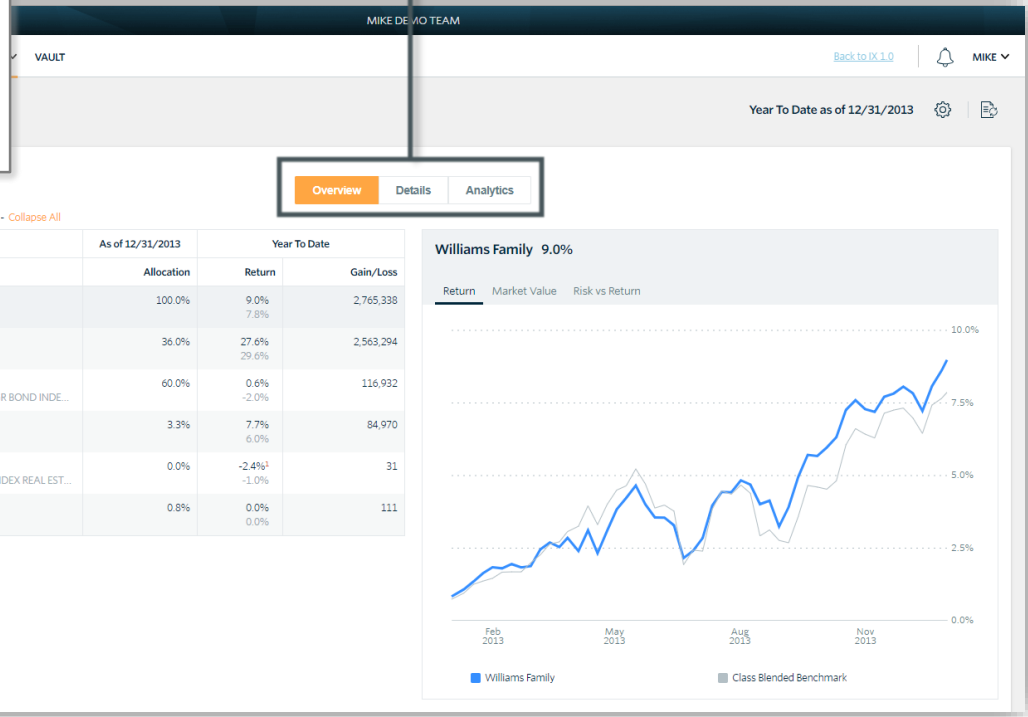


(Consolidated View)

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

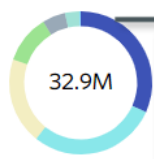


(Expanded View)

# Allocation

View the allocation breakdown of your portfolio

**Allocation >**



**12/31/2013**  
 XXXX4442 - Williams - Alliance Bernstein  
 Actual: **10,435,640**  
 Weighting: **31.7%**

Group By: **Account/Class** ▾

XXXX4442 - Williams - Alliance Bernstein	31.74%	10.44M
XXXXX2303 - Williams Trust - PIMCO	28.99%	9.53M
XXXX7621 - Williams Foundation	19.57%	6.44M
XXXXX5416 - Williams Rev Trust	10.95%	3.60M
XXXXX2968 - Williams Managed Growth Fund	5.18%	1.70M

Hover to view grouping level allocation detail

Toggle your view between a single day snapshot and a drift chart for allocation over time

(Consolidated View)

Change the data grouping from the dashboard or the expanded card

MIKE DEVO TEAM

HOME MY ACCOUNTS PORTFOLIO VAULT

Back to IX 1.0 MIKE ▾

Year To Date as of 12/31/2013

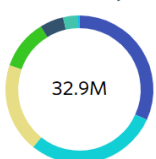
**Williams Family** ▾

Filter

**< Allocation**

Snapshot Drift

Collapse Chart



XXXX4442 - Williams - Alliance Bernstein	31.74%	10.44M
XXXXX2303 - Williams Trust - PIMCO	28.99%	9.53M
XXXX7621 - Williams Foundation	19.57%	6.44M
XXXXX5416 - Williams Rev Trust	10.95%	3.60M
XXXXX2968 - Williams Managed Growth Fund	5.18%	1.70M

< Previous 1 / 2 Next >

Name	Symbol	Units	Allocation of Total	Ending Value
Williams Family	--	--	100.0%	32,879,952
> XXXX4442 - Williams - Alliance Bernstein	--	--	31.7%	10,435,640
> XXXX7621 - Williams Foundation	--	--	19.6%	6,436,044
> XXXXX2303 - Williams Trust - PIMCO	--	--	29.0%	9,532,897
> XXXXX2968 - Williams Managed Growth Fund	--	--	5.2%	1,703,995
> XXXXX5416 - Williams Rev Trust	--	--	10.9%	3,600,059
> XXXXX6082 - Tina Hickson	--	--	0.3%	90,994
> XXXXX6-AI - BD CAPITAL PARTNERS	--	--	3.3%	1,080,322

Group By: **Account/Class** ▾ | Expand Level - collapse All

(Expanded View)

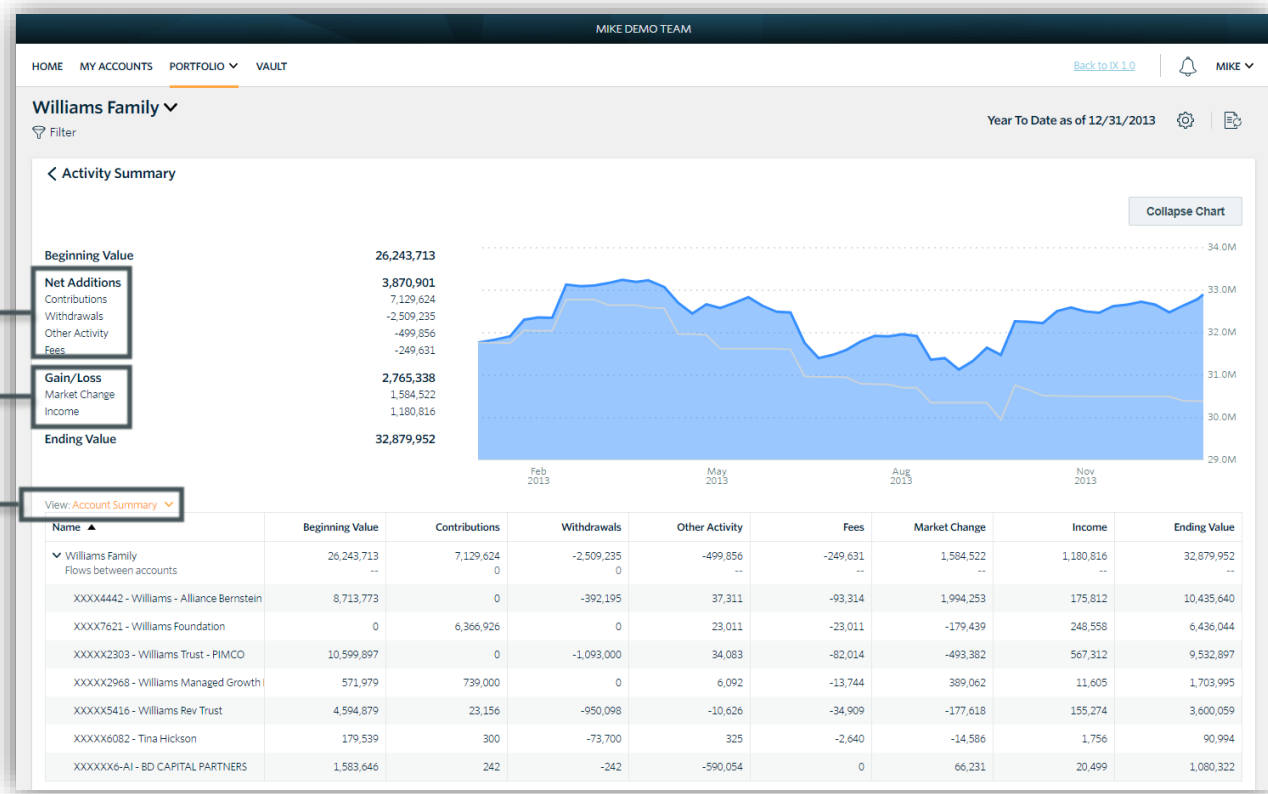
# Activity Summary

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



(Expanded View)

View breakout of additions and withdrawals

See income and performance breakouts

Toggle to view either summary detail or transactions

# Transactions

View and filter the most recent transactions in your portfolio

**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
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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

(Consolidated View)

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

**Settings** ✕

**Supervised**

All Assets

Supervised Only

Unsupervised Only

**Transaction Type Filter**

Select filters to apply to data table (not applicable to the Dashboard Summary)

[Select All - Deselect All](#)

Buys       Capital Gains       Contributions

Sells       Income       Withdrawals

Management Fees       Alternatives

Expenses       Other

Apply Cancel

MIKE DEMO TEAM

HOME MY ACCOUNTS **PORTFOLIO** VAULT [Back to IX 1.0](#) MIKE

**Williams Family** Year To Date as of 12/31/2013

Filter

**Transactions**

Date	Account Number	Account Name	Action	Type	Asset Name	Symbol	Units	Price	Amount	Description
12/24/13	XXXXX2303	Williams Trust - PIMCO	Buy	Buy	FEDERAL HOME LN BK CONS DISC NOTES 0.000% 01/02/14 B/EDTD 01/02/13	313385RG3	200,000	100	199,988	--
12/24/13	XXXXX2303	Williams Trust - PIMCO	Sale	Sale	FEDERAL HOME LN BK CONS DISC NOTES 0.000% 01/02/14 B/EDTD 01/02/13	313385RG3	200,000	100	-199,988	--
12/24/13	XXXXX6082	Tina Hickson	Buy	Buy	ISHARES INC MSCI MEXICO	EWW	36	68	2,438	--
12/23/13	XXXXX6082	Tina Hickson	Buy	Buy	ISHARES INC MSCI MEXICO	EWW	33	67	2,218	--
12/23/13	XXXXX6082	Tina Hickson	Buy	Buy	WISDOMTREE JAPAN HEDGED EQUITY	DXJ	45	50	2,266	--
12/23/13	XXXXX6082	Tina Hickson	Sale	Sale	MARKET VECTORS ETF TR VIETNAM ETF	VNM	675	18	-12,406	--

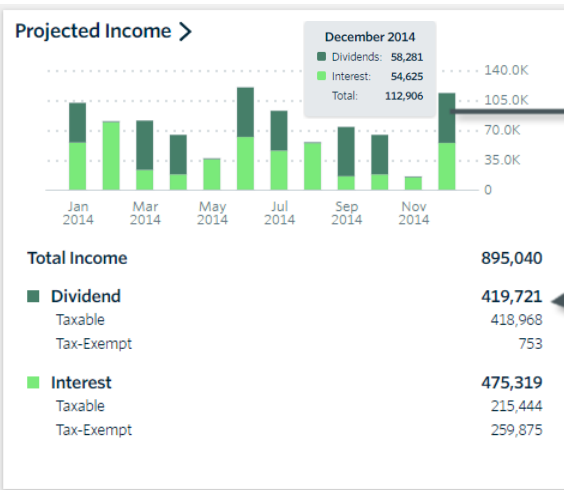
Sort column headers to quickly organize your transactions

Filters - 2 Types  
Buys  
Sells

(Expanded View)

# Projected Income

Review a snapshot of expected dividend and interest payments



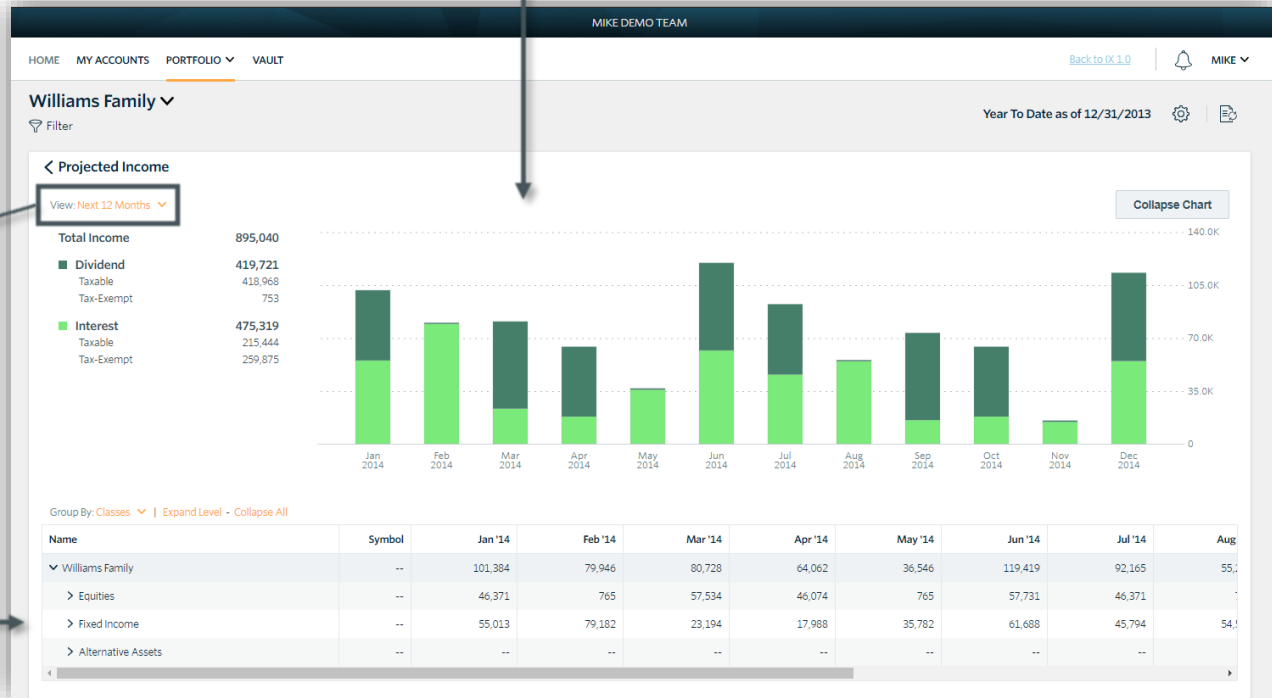
Hover to view monthly dividend and interest detail

The card displays total projected income for the selected time period, a breakout of projected dividends and interest, plus a month-by-month bar chart

(Consolidated View)

Choose between viewing projected income for 'Next 12 Months' or 'Remainder of Year'

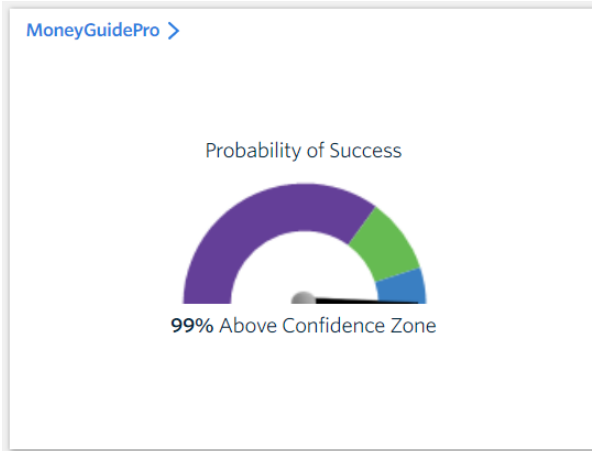
View projected income at your grouped level



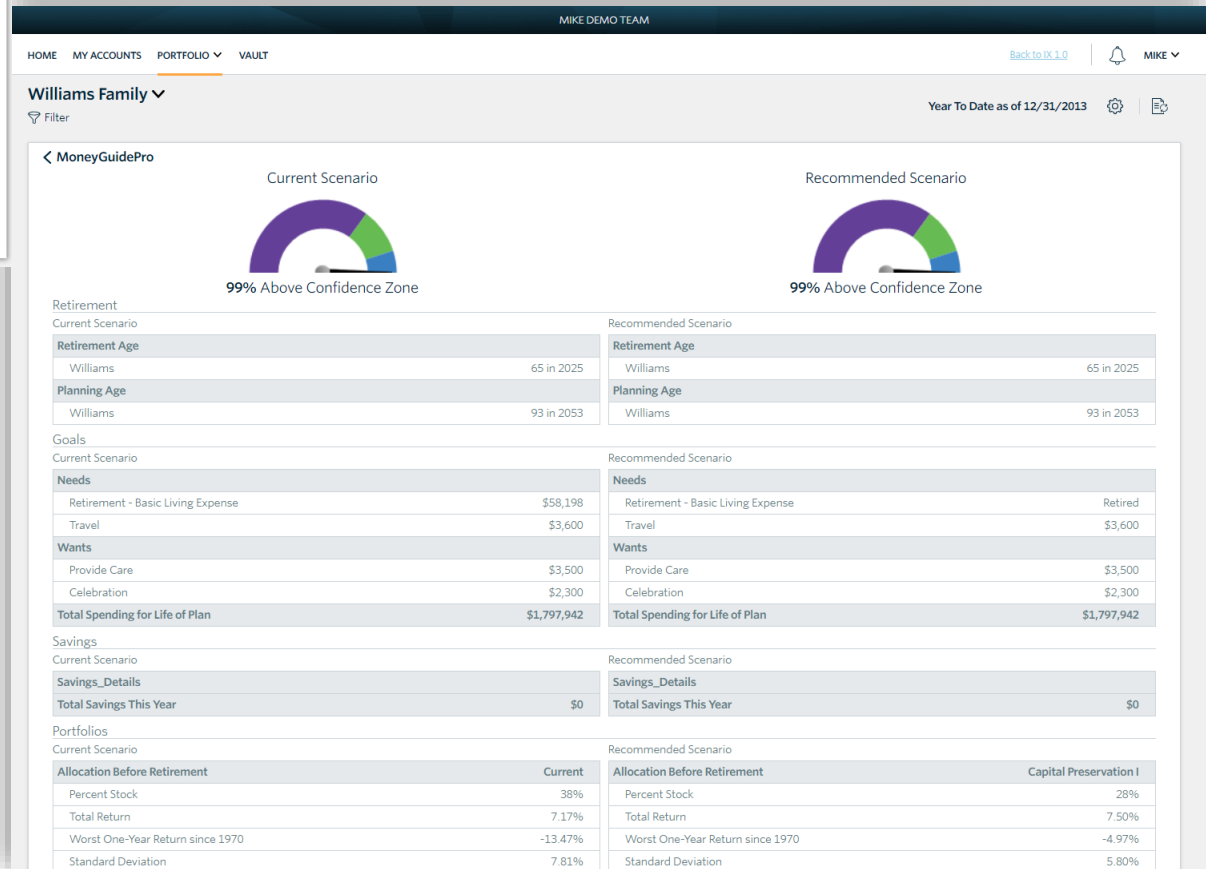
(Expanded View)

# MoneyGuidePro

View information from your Financial Planning Software, including the Probability of Success



(Consolidated View)



(Expanded View)

# Capital Markets

View independent benchmark information across multiple date ranges

**Capital Markets >**

Benchmark	Return
S&P 500 INDEX	29.6%
RUSSELL INDEX 1000 WITH/DIV	33.1%
MSCI EMERGING EM (EMERGING MKTS) (USD)	-5.0%
MSCI DEVELOPED EAFE (USD) (TRG)	23.3%
RUSSELL INDEX 1000 GR WITH/DIV	33.5%
RUSSELL INDEX 1000 VL WITH/DIV	32.5%
RUSSELL INDEX MID CAP WITH/DIV	34.8%
RUSSELL MDCAP GR W/DIV	35.7%
RUSSELL MDCAP VL W/DIV	33.5%
RUSSELL INDEX 2000 WITH/DIV	38.8%

(Consolidated View)

View Year-To-Date benchmark return data at a glance

Change the "As of" date from the date picker to change the starting point of the data displayed

Expand and collapse the groupings to view all benchmarks available

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HOME MY ACCOUNTS **PORTFOLIO** VAULT

Williams Family **▼**

Filter Back to IX 1.0

Year To Date as of 12/31/2013

**< Capital Markets**

Expand Level - Collapse All



Name	Benchmark	Inception Date	Current Day	Month To Date	Quarter To D...	Year To Date	Last 12 Months	Last 2 Years	Last 3 Years	Since Inception
> Equities	S&P 500 INDEX	04/30/1987	0.4%	2.4%	9.9%	29.6%	29.6%	47.0%	47.0%	541.0%
> Fixed Income	BLOOMBERG BARCLAYS AGGR B...	03/31/1976	-0.1%	-0.6%	-0.1%	-2.0%	-2.0%	2.1%	10.1%	1,659.4%
> Alternative Assets	6% ABSOLUTE RETURN	01/29/1988	0.0%	0.5%	1.5%	6.0%	6.0%	12.4%	19.1%	134.2%
> Annuities	LIPPER MULTI-CAP VALUE FUNDS	12/31/1969	0.4%	2.2%	9.8%	34.7%	34.7%	58.0%	48.8%	7,619.0%
> REITS	DOW JONES WILSHIRE U S INDE...	12/29/2005	-0.3%	0.4%	-0.6%	-0.8%	-0.8%	13.9%	14.5%	-4.4%
> Cash & Equivalents	90 DAY TREASURY BILL	01/31/1985	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%	0.2%	194.9%
Global Equity	MSCI WORLD INDEX NET IN LOC	12/29/2000	0.3%	2.1%	8.4%	28.9%	28.9%	49.1%	40.9%	51.5%


Performance is not correlated to portfolio holding period


(Expanded View)

# Login Problems

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

Username   
Password   
**Sign In**  
**Trouble Logging In?**

**Error!** Invalid username and password combination. 

**Error!** Your user account has been locked. Please click "Trouble logging in?" to unlock your account. 

**Trouble logging in?**  
*What's the problem?*  
I forgot my password.  
I forgot my username.  
I need to unlock my account.

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

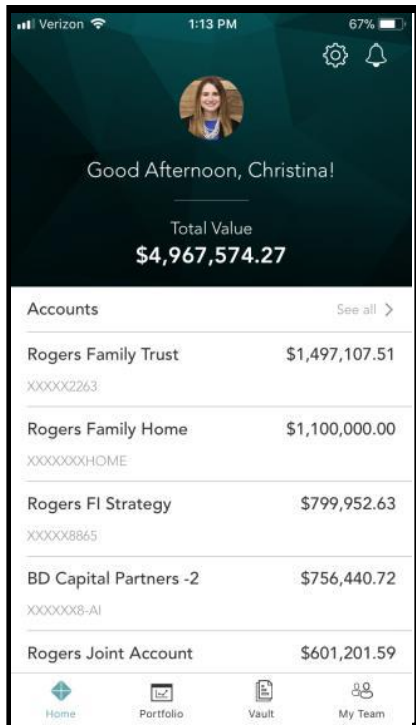
Please use the link below to reset your password:  
<https://bd3.bdreporting.com/Auth/Default/ResetPassword/CtEU7X0gT0StVRValXJGdA>  
This is a temporary link and will expire in 2 days.  
If you did not request this password reset, please contact your administrator.  
Thanks,  
Black Diamond  
--- This is an auto generated email. Please do not reply. ---

# Mobile Application

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



Search for “Black Diamond Wealth Platform”



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.

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