Scottsdale Wealth Planning

WELCOME TO

Your Personal Financial Portal

Stay Connected

To Your Financial Picture

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At-a-glance view of pertinent account information

[PORTFOLIO](#)
Dynamic view of your entire portfolio

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Important communications from your advisor team

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

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Detailed list of your accounts

[LOGIN QUESTIONS](#)
Helpful hints and troubleshooting

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.

Getting Started

You will receive a **welcome email** at your preferred personal email address with instructions on how to log in initially. Simply follow those instructions to create and verify your login credentials and you will have access to your portal.

Amplify Platform noreply@bdreporting.com
to me ▼

Nov 15, 2021, 3:12 PM

Scottsdale Wealth Planning

Dear John,

Scottsdale Wealth Planning has created an account for you to log in to the platform reporting area.

Your username is JSmith123. Please click on the following to set up your account.

Set Up Account

Or, paste this link into your browser:

https://bd3.bdreporting.com/Auth/Amplify/4175/SignUp/zSP0bglPQXxFC0sMkep0XdRDmEEXjGAL

(This is a temporary link and will expire in 7 days.)

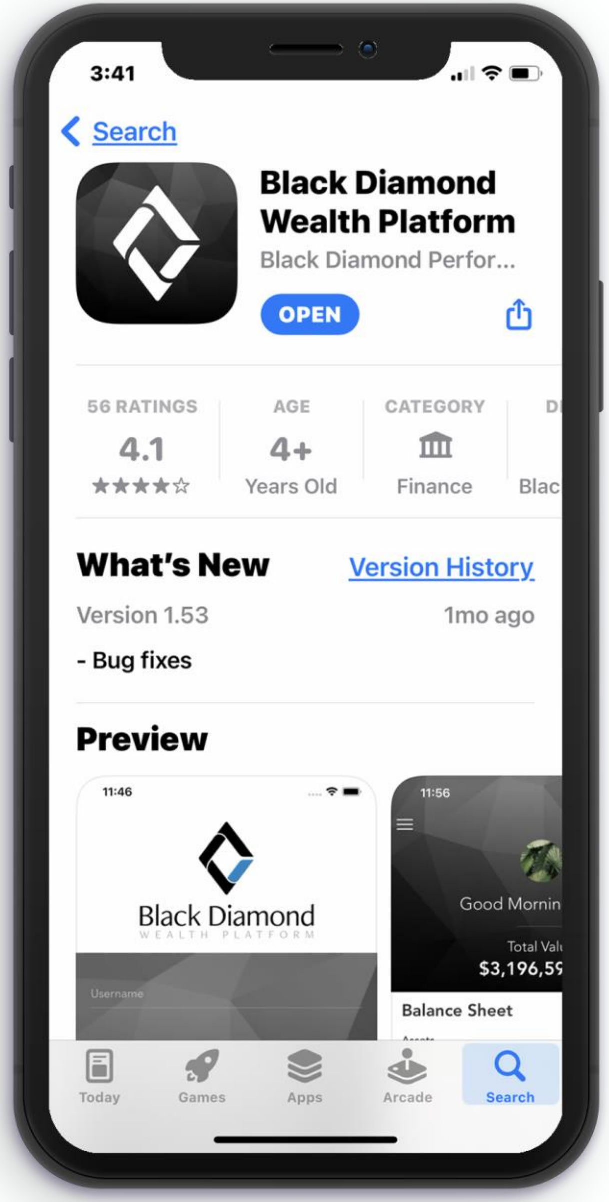
Thanks,
Scottsdale Wealth Planning

Getting Started

The portal is easily accessed through a mobile app or through any internet browser on your desktop or laptop.

To access your portal via a mobile app, go to your mobile app store and type in “Black Diamond Wealth Platform” to locate and download the app. Black Diamond is our preferred vendor for mobile portal access.

You can use the login credentials you established to log in via the mobile app.



Getting Started

Logging in via the web is simple.

To log in from a web browser, go to the firm website and click on the MENU

Click CLIENT LOGIN to access the portal and enter your credentials

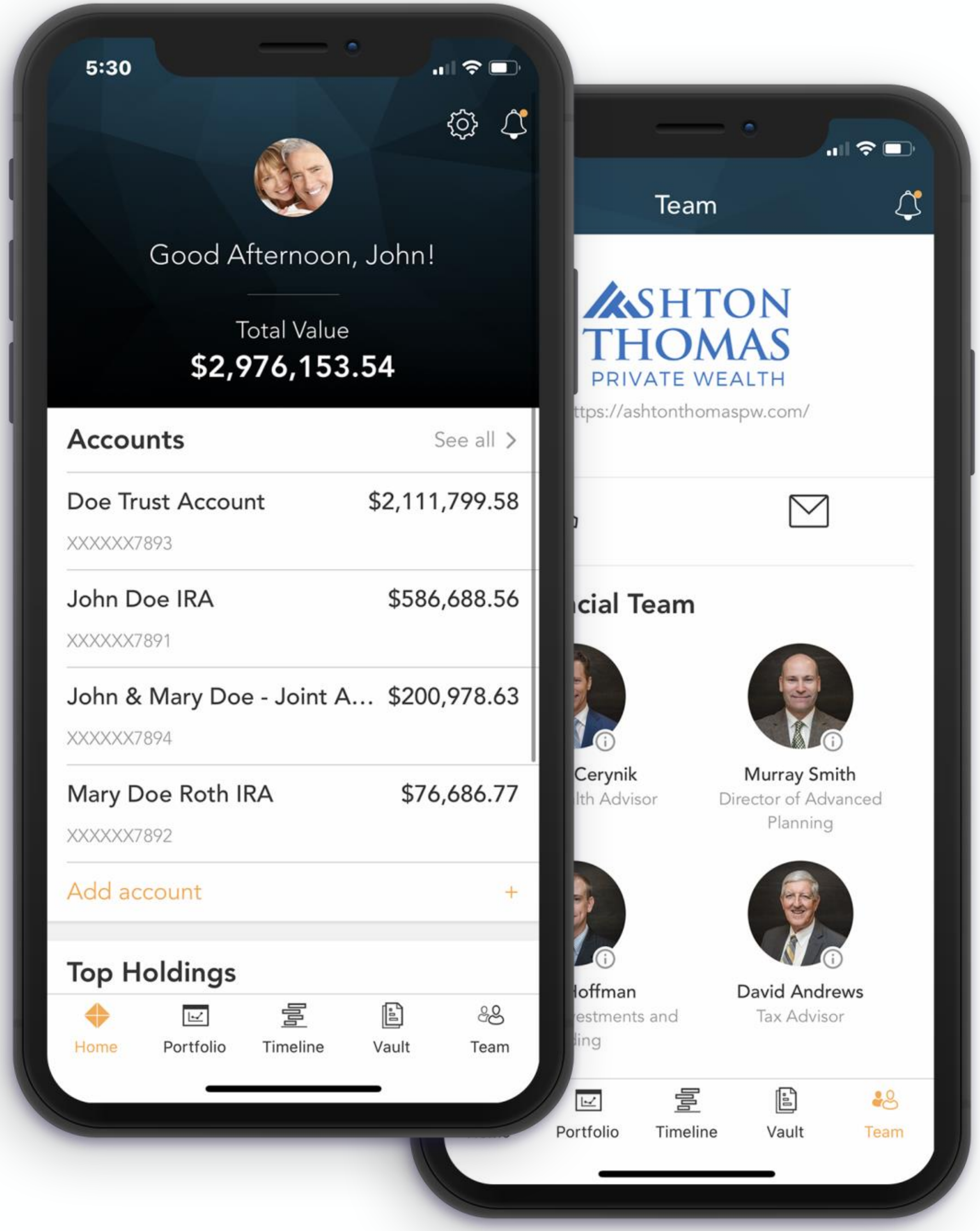
Home
Page

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.



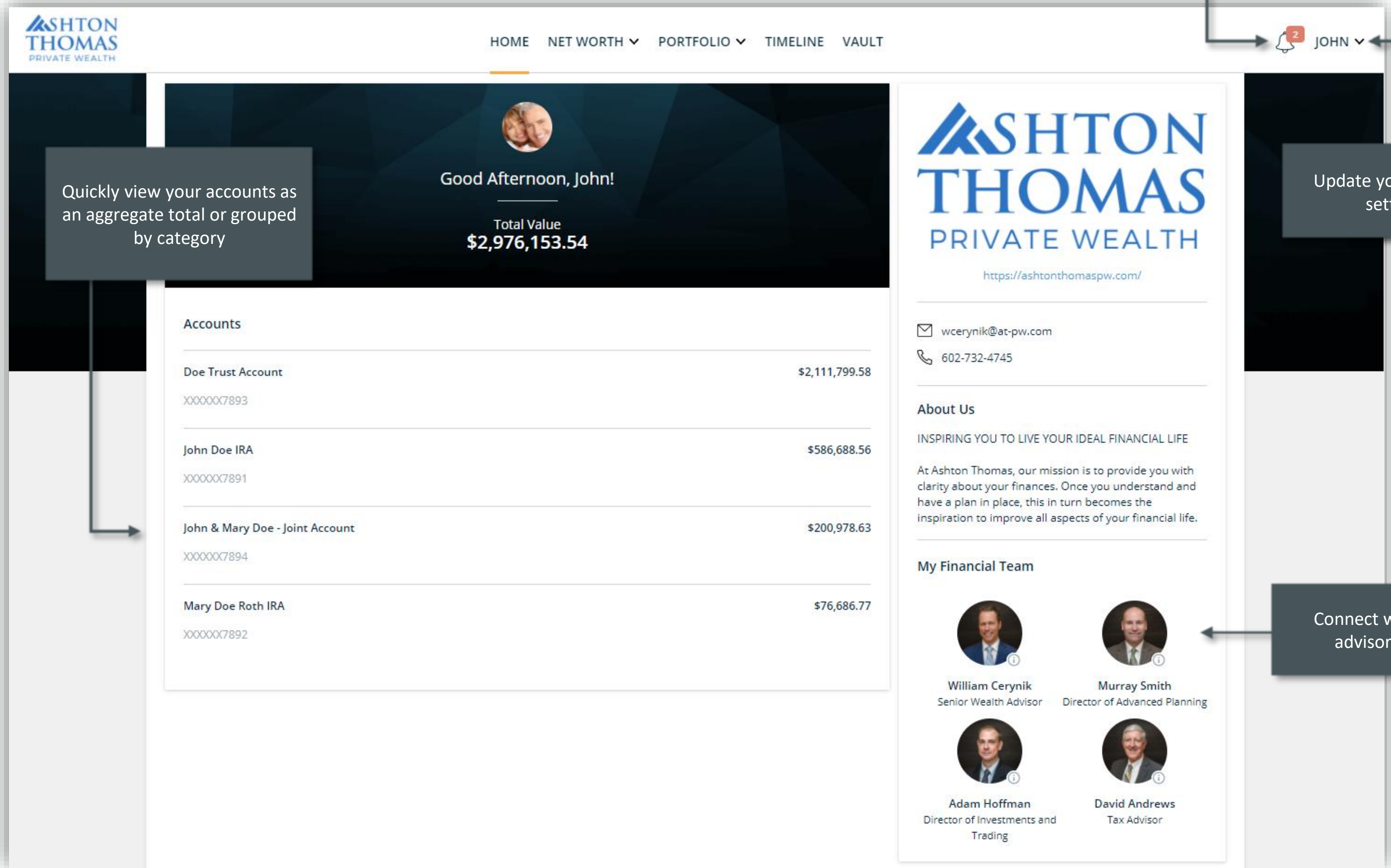
Home Page

View your alerts and investment reports

Update your account settings

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

Connect with your advisor team

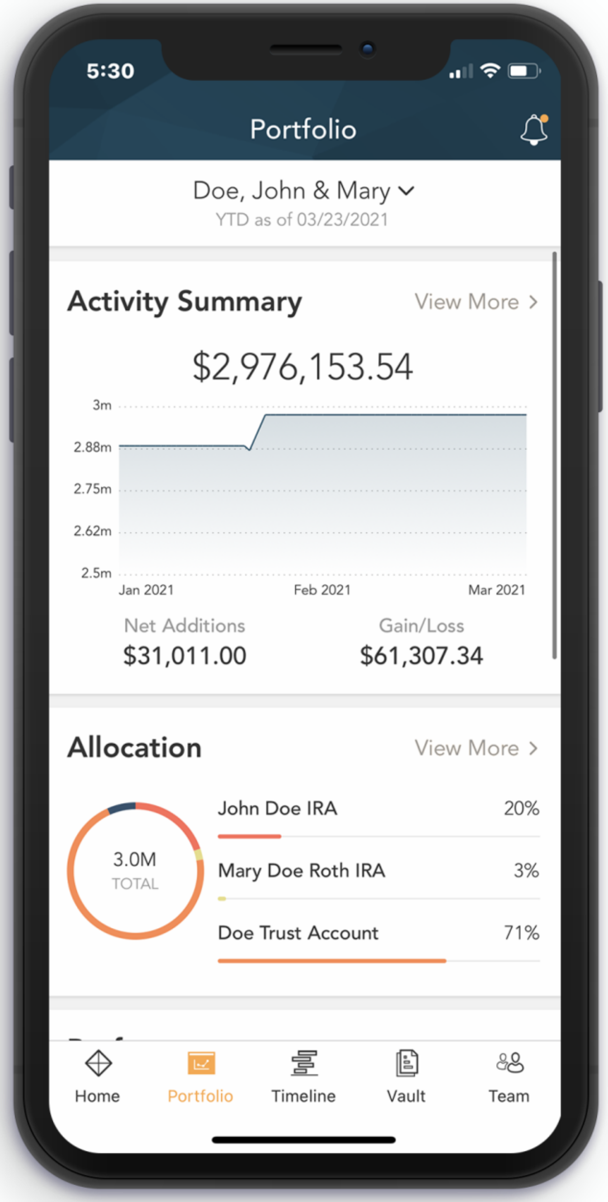


Portfolio

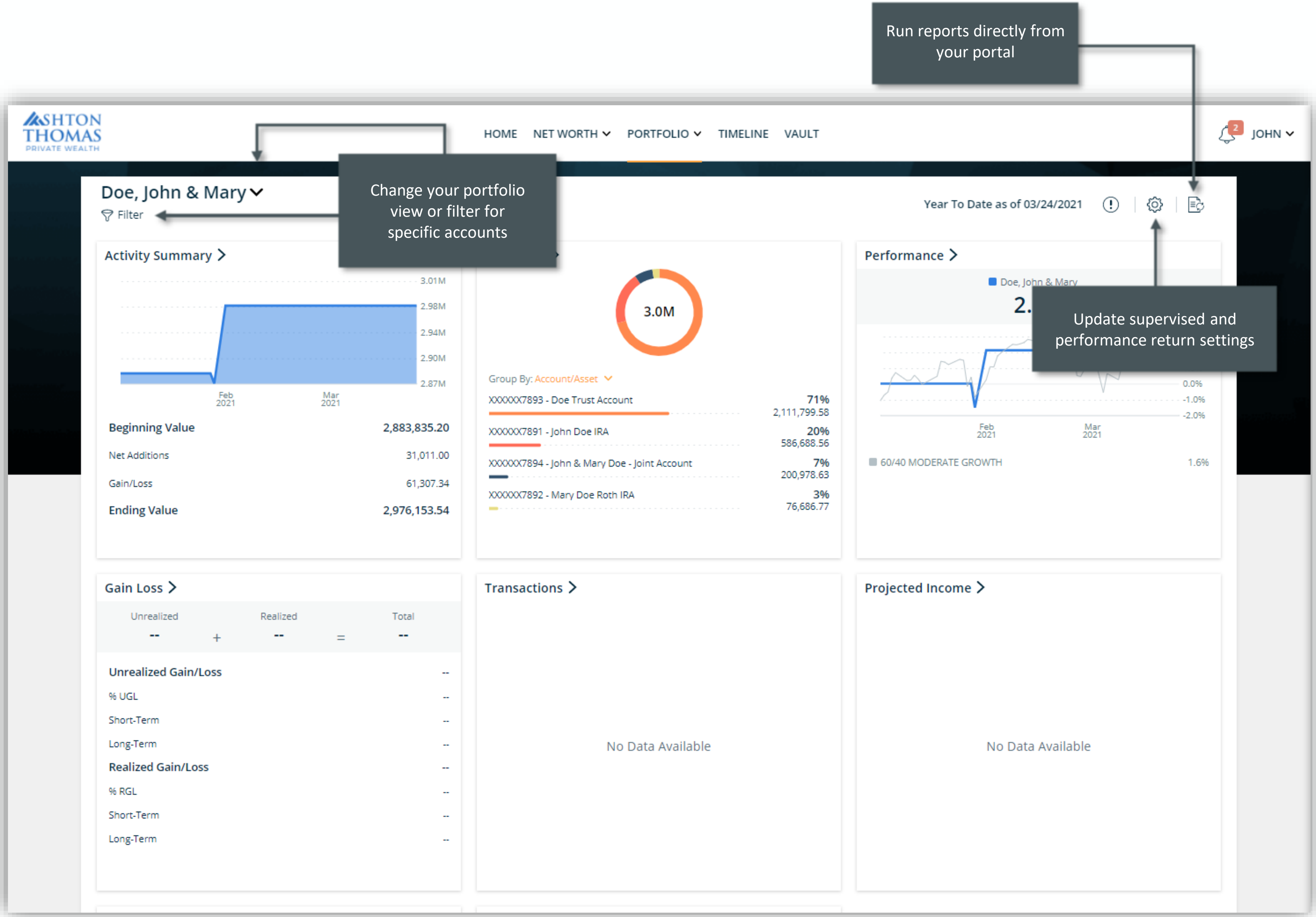
The Portfolio dashboard is where you can view additional details about your portfolio. The dashboard gives you a dynamic overview of your portfolio with performance cards highlighting key information of your portfolio.

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.



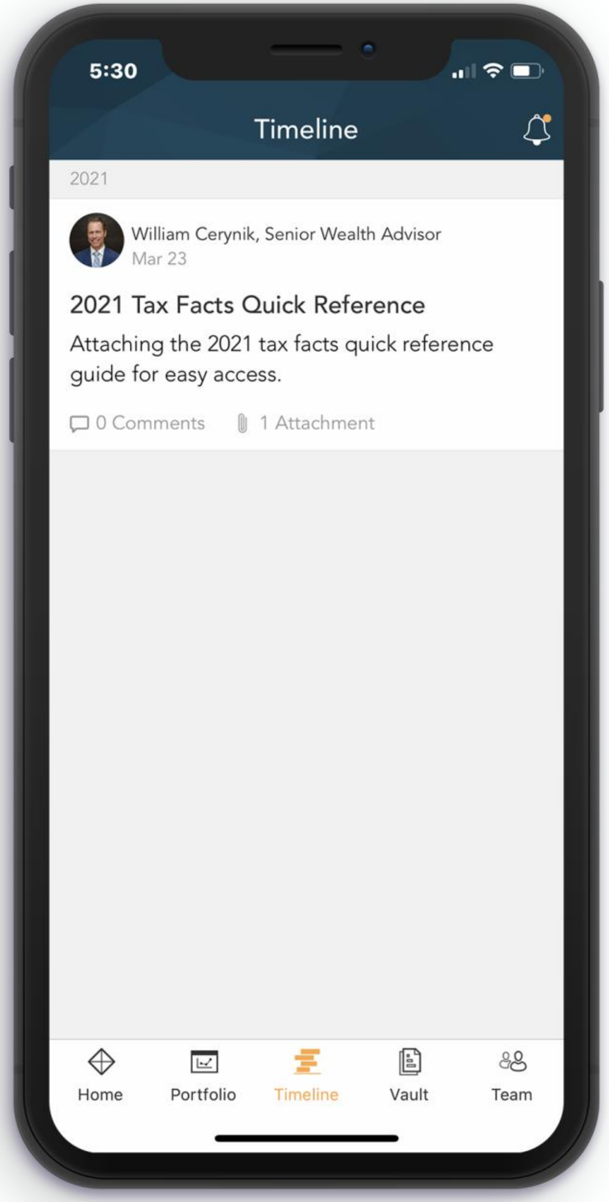
Portfolio


Run reports directly from your portal
Change your portfolio view or filter for specific accounts
Update supervised and performance return settings
ASHTON THOMAS PRIVATE WEALTH
HOME
NET WORTH
PORTFOLIO
TIMELINE
VAULT
JOHN
Doe, John & Mary
Filter
Year To Date as of 03/24/2021
Activity Summary
Beginning Value 2,883,835.20
Net Additions 31,011.00
Gain/Loss 61,307.34
Ending Value 2,976,153.54
3.0M
Group By: Account/Asset
XXXXXX7893 - Doe Trust Account 71% 2,111,799.58
XXXXXX7891 - John Doe IRA 20% 586,688.56
XXXXXX7894 - John & Mary Doe - Joint Account 7% 200,978.63
XXXXXX7892 - Mary Doe Roth IRA 3% 76,686.77
Performance
Doe, John & Mary
60/40 MODERATE GROWTH 1.6%
Gain Loss
Unrealized + Realized = Total
Unrealized Gain/Loss
% UGL
Short-Term
Long-Term
Realized Gain/Loss
% RGL
Short-Term
Long-Term
Transactions
No Data Available
Projected Income
No Data Available

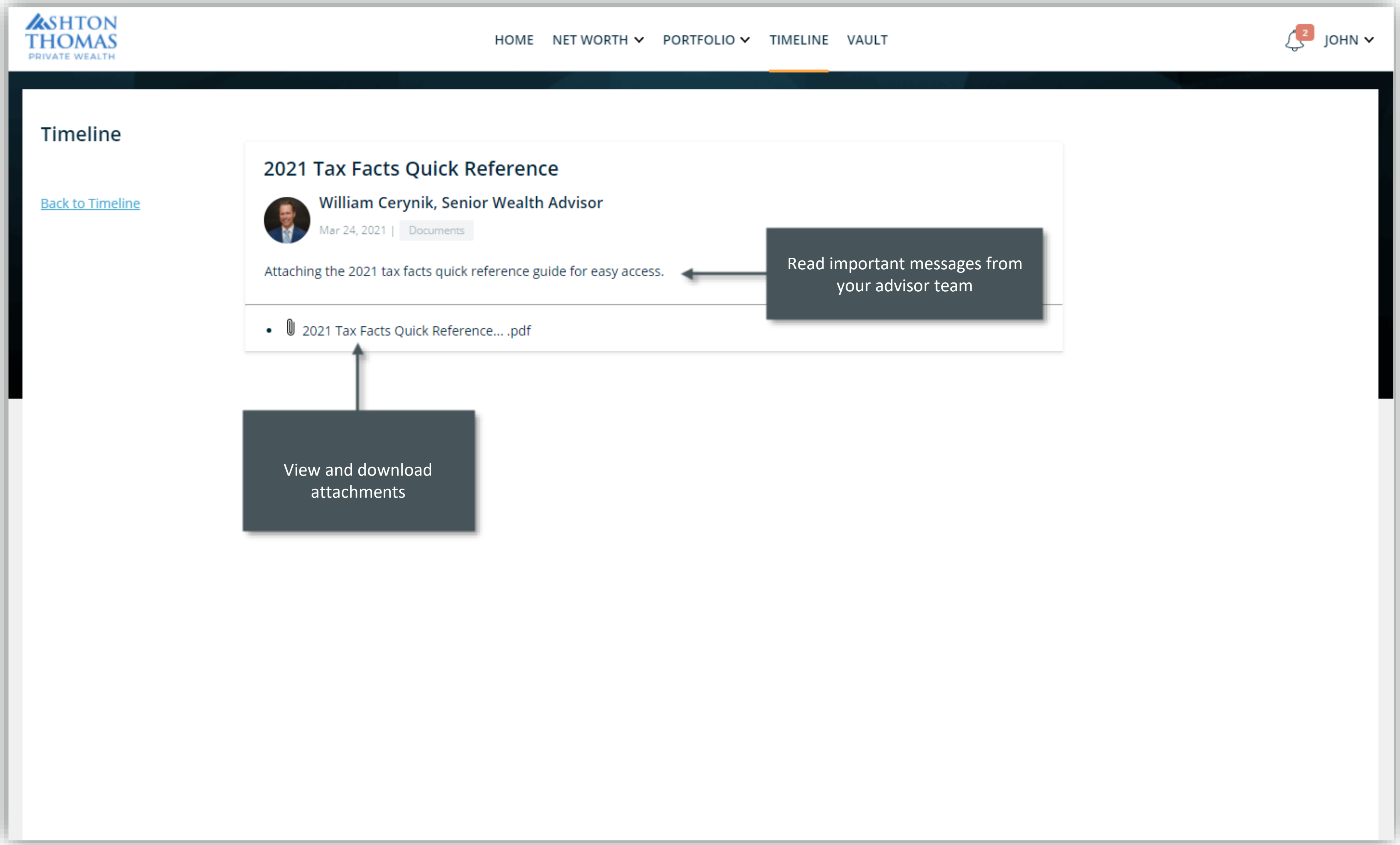
Timeline

Timeline allows your advisor team to deliver relevant, timely content to you through your portal experience.

In addition, Timeline acts as a library of important reference material and market commentary to which you can refer back at any time.



Timeline


ASHTON THOMAS PRIVATE WEALTH
HOME
NET WORTH
PORTFOLIO
TIMELINE
VAULT
JOHN
Timeline
Back to Timeline
2021 Tax Facts Quick Reference
William Cerynik, Senior Wealth Advisor
Mar 24, 2021 |
Documents
Attaching the 2021 tax facts quick reference guide for easy access.
2021 Tax Facts Quick Reference... .pdf
Read important messages from your advisor team
View and download attachments

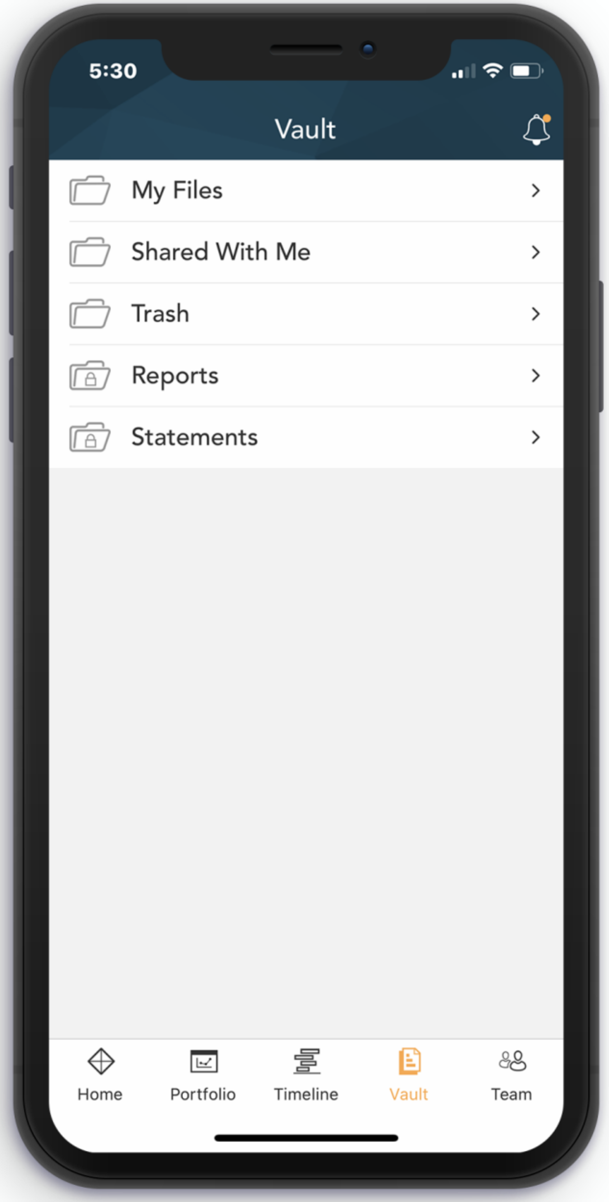
Vault

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.

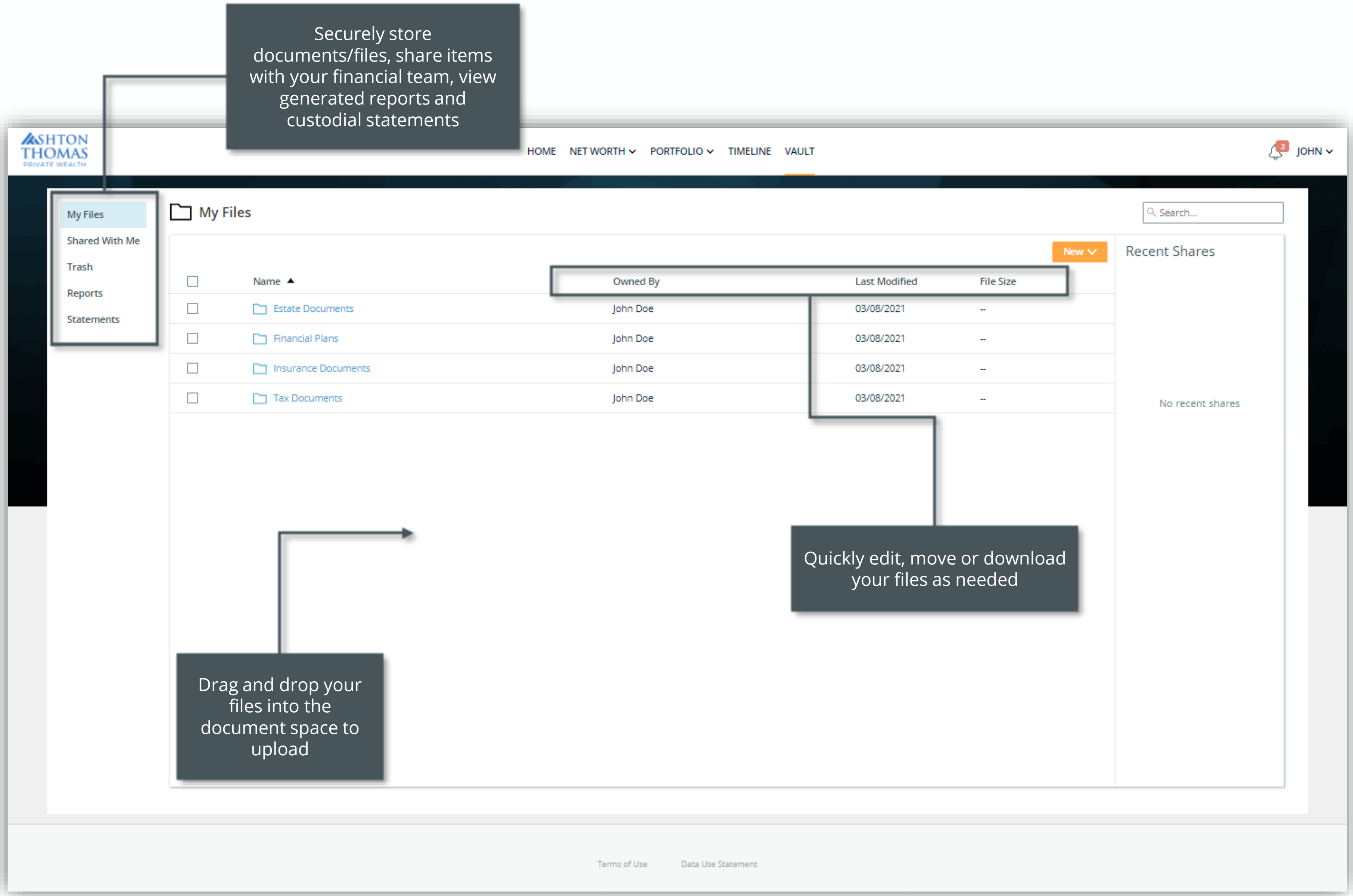
From here, you can organize your documents into folders, drag-and-drop to upload new documents, and easily move files from one folder to another.

The Vault is also an area where we can share documents 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.



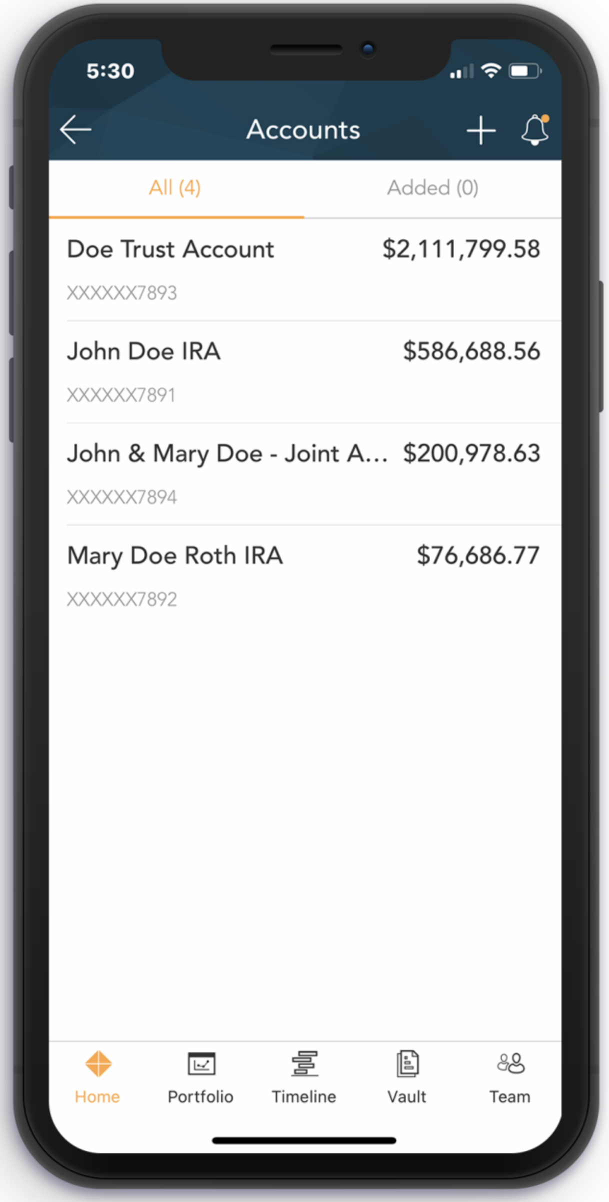
Vault


Securely store documents/files, share items with your financial team, view generated reports and custodial statements
ASHTON THOMAS PRIVATE WEALTH
HOME
NET WORTH
PORTFOLIO
TIMELINE
VAULT
JOHN
My Files
Shared With Me
Trash
Reports
Statements
My Files
Search...
New
Recent Shares
Name
Owned By
Last Modified
File Size
Estate Documents
John Doe
03/08/2021
Financial Plans
John Doe
03/08/2021
Insurance Documents
John Doe
03/08/2021
Tax Documents
John Doe
03/08/2021
No recent shares
Quickly edit, move or download your files as needed
Drag and drop your files into the document space to upload
Terms of Use
Data Use Statement

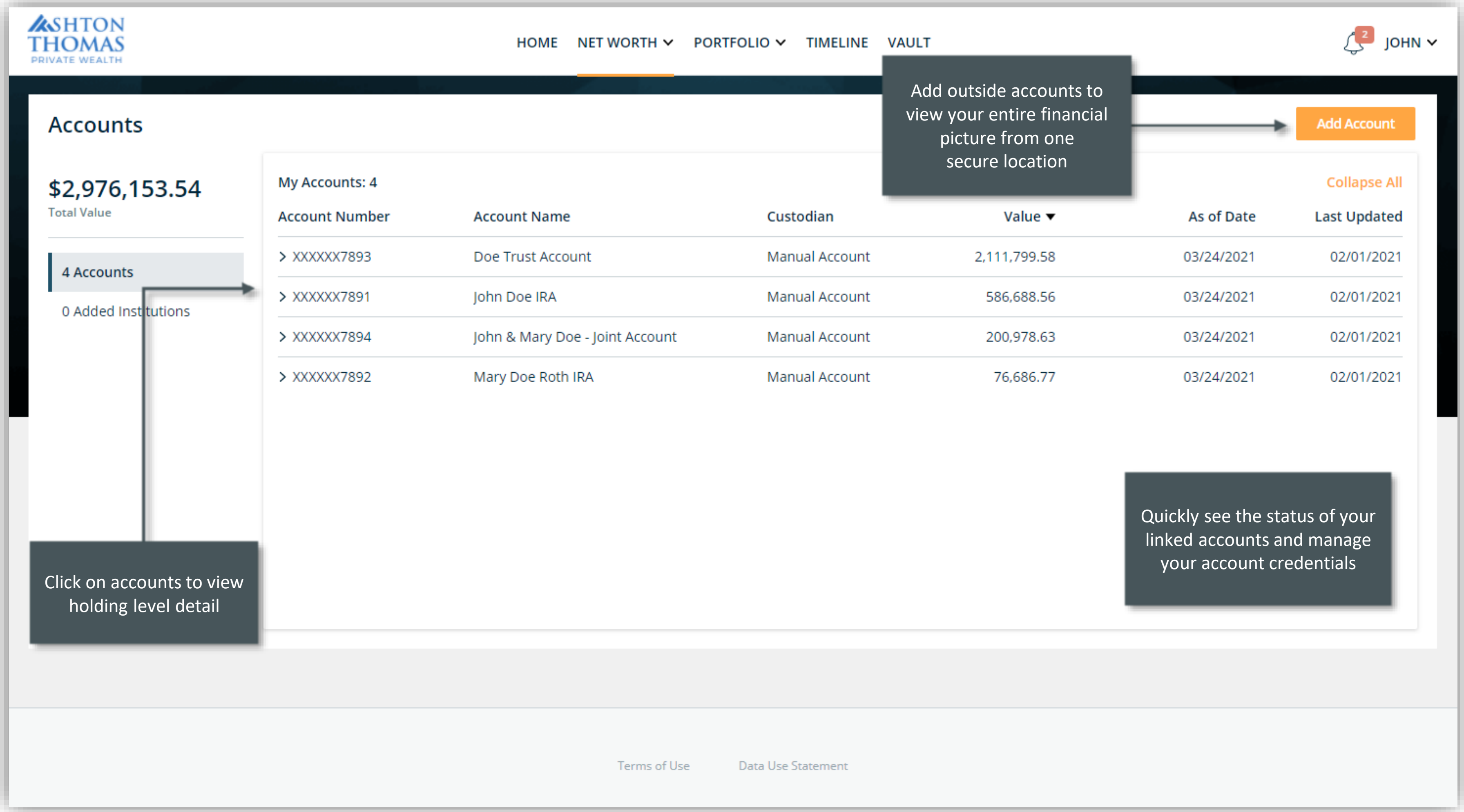
My Account

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.

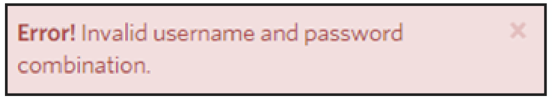


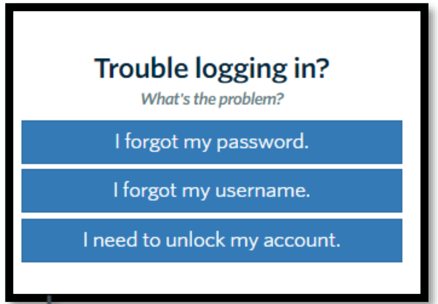
My Account


ASHTON THOMAS PRIVATE WEALTH
HOME
NET WORTH
PORTFOLIO
TIMELINE
VAULT
JOHN
Accounts
Add outside accounts to view your entire financial picture from one secure location
Add Account
$2,976,153.54
Total Value
4 Accounts
0 Added Institutions
My Accounts: 4
Collapse All
Account Number | Account Name | Custodian | Value | As of Date | Last Updated
XXXXXX7893 | Doe Trust Account | Manual Account | 2,111,799.58 | 03/24/2021 | 02/01/2021
XXXXXX7891 | John Doe IRA | Manual Account | 586,688.56 | 03/24/2021 | 02/01/2021
XXXXXX7894 | John & Mary Doe - Joint Account | Manual Account | 200,978.63 | 03/24/2021 | 02/01/2021
XXXXXX7892 | Mary Doe Roth IRA | Manual Account | 76,686.77 | 03/24/2021 | 02/01/2021
Quickly see the status of your linked accounts and manage your account credentials
Click on accounts to view holding level detail
Terms of Use
Data Use Statement

Login Questions

Some tips for accessing your portal account if you have trouble signing in

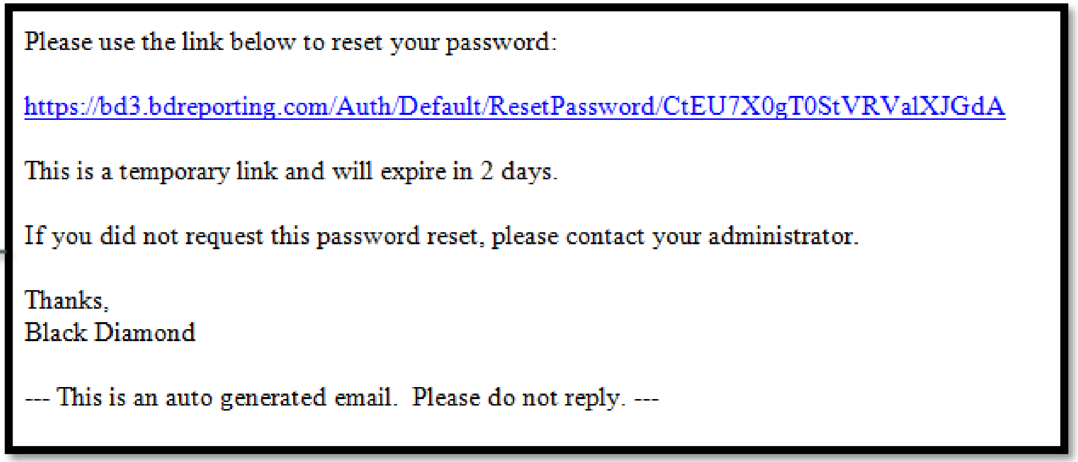




Select "Trouble logging in?" on the sign-in page for help

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. ---

We Are
Here to Help

Please don't hesitate to reach out with questions or if needing help setting up your login.

www.scottsdalewealthplanning.com