



Black Diamond
WEALTH PLATFORM

PORTFOLIO PERFORMANCE REPORTING (www.bd3.bdreporting.com)

You can access your **portfolio performance** information whenever you like. Your quarterly performance reports will be available electronically via the portal and accessible at your convenience.

You will also have the ability to access and share documents through our **secure document vault**.

If you have worked with us to create your **Retirement Income Plan**, you will be able to view your plan results every time you log in.

You will also be able to link directly to our **other online portals** (see below).

We recommend that you bookmark this page for future reference.



FINANCIAL PLAN (www.moneyguidepro.com/ifa/guest)

You can access your completed **Retirement Income Plan** and view your updated plan results every time you log on. Through the portal, you can electronically link outside accounts, such as a 401(k) to your plan, which enables your financial plan to update in "real-time." We provide **interactive tools** such as the "Play Zone" and "What Are You Afraid Of"? which allows you to experiment with

factors you can and can't control. Additionally, you will have **access to the details of your plan** such as an annual cash flow report, Social Security analysis, and net worth statement.

Access to this portal is for those who have engaged our services to create their Retirement Income Plan.



NETXINVESTOR (www.netxinvestor.com)

NetXInvestor enables you to view comprehensive account details such as account balances, holdings, history, projected cash flow, **monthly statements, and tax documents**. Once online you can enroll for paperless statements and trade confirmations by clicking the "

Go Paperless

" link. Additionally, you can download the mobile app to view your accounts as well as electronically deposit checks into your accounts (\$25,000 limit).