

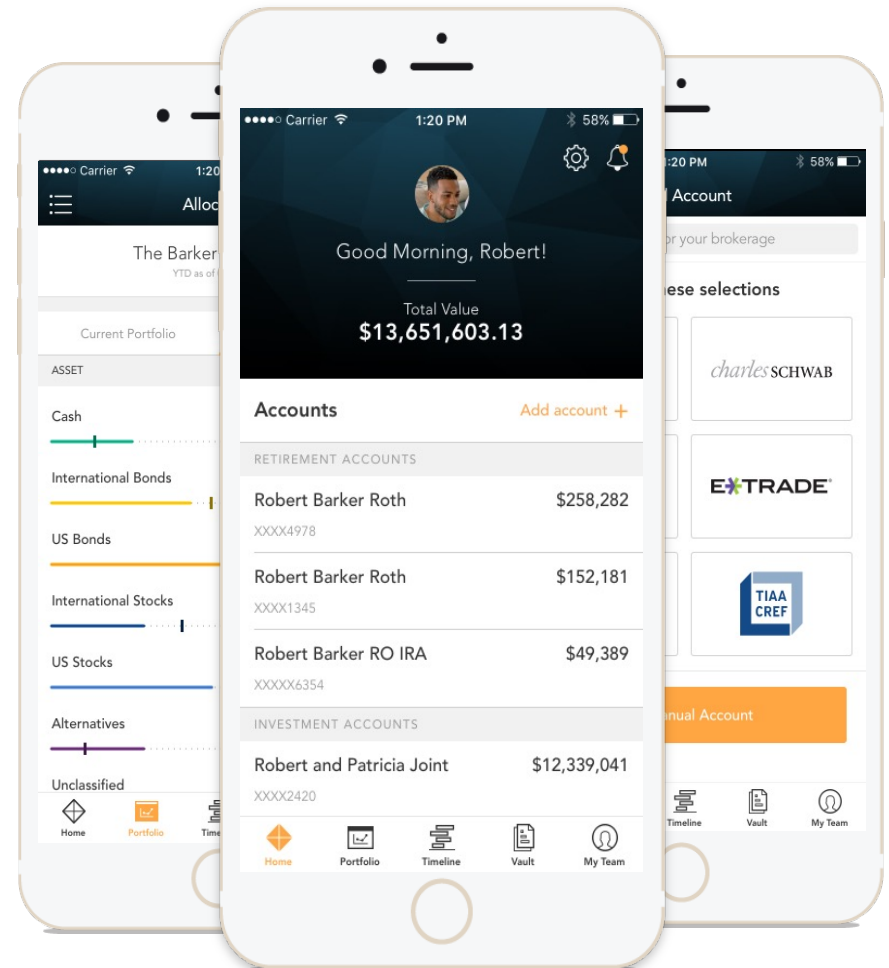


**WELCOME TO
YOUR PERSONAL
FINANCIAL PORTAL**



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

Portfolio

Dynamic view of your entire portfolio

Vault

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

Net Worth

A detailed list of your accounts and balance sheet report with aggregation capabilities

Login Questions

Helpful hints

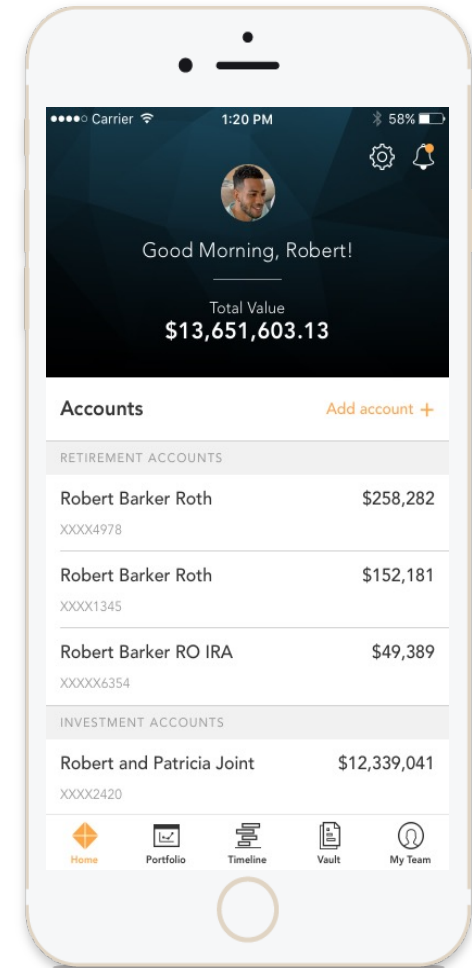
Home Page

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



HOME NET WORTH ▾ PORTFOLIO ▾ TIMELINE VAULT



Good Morning, Christina!

Total Value
\$5,017,475.46

Accounts

Brokerage

Rogers Joint Account	\$601,201.59
XXXXXXXXXXXX1886	
Individual	\$49,901.19
XXXXXXXXXXXX6736	

Mortgage

Rogers Primary Mortgage	-\$381,421.35
XXXXXXXXXXXXXGAGE	

Retirement

Rogers FI Strategy	\$799,952.63
XXXXXX8865	
Nick Rogers IRA	\$288,301.53
XXXXXX68EC	

Trust

Rogers Family Trust	\$1,497,107.51
XXXXXX2263	
Rogers Irrevocable Trust	\$149,083.21



<https://bd3.bdreporting.com>

✉ info@sscinc.com
☎ 904-241-2444
📍 9000 Southside Blvd Suite 7500, Jacksonville, FL 32256

About Us

Today, Deliver Wealth Management's commitment to your success is as strong as ever. Our ability to deliver has been strengthened by our vast global portfolio of technology applications and services. Our combined business units deliver innovative solutions to more than 10,000 families and institutions worldwide. Together with our clients, we are continuing to transform the wealth management industry.

My Financial Team



Brad McDonald
Advisor



George Wayne
Advisor



Erica Campbell
Portfolio Manager

Communicate or schedule
an appointment with your
financial team directly

Pick and choose stocks, ETF
and mutual funds that
matter to you to track daily

Watch List

[Manage Watch List >](#)

SSNC	57.17
SS&C TECHNOLOGIES HLDGS INC COM	-0.24
CO	100.43

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

Home Page Continued..

DELIVER WEALTH MANAGEMENT

HOME NET WORTH ▼ PORTFOLIO ▼ TIMELINE VAULT

ERICA

Trust

Rogers Family Trust	\$1,497,107.51
XXXXX2263	
Rogers Family Trust	\$1,365,935.91
XXXXX7163	
Charles Family Trust	\$267,510.13
XXXX4995	
Rogers Irrevocable Trust	\$149,083.21
XXXXX1639	

Education

Michelle's 529	\$115,130.21
XXX4595	
Rogers 529	\$41,126.11
XXXXX9539	
Connor's 529	\$11,488.44
XXXXX0129	

Credit Cards

Rogers American Express	-\$65,000.00
XXXXXXXXXAMEX	

Corporate

Charles & Co.	\$395,593.73
XXXXX0970	
Rogers & Co.	\$180,782.31
XXXXX5090	

Real Estate

ADD NEW SYMBOL

ADD SYMBOL +

Top Holdings

XOM	13%
ROGERS HOME	13%
DFSMX	9%
CHDVX	5%
VDIGX	4%
DFTIX	3%
CVSIX	2%
CASH	2%
SAMBX	2%
FPACX	2%

External Links

- Wells Fargo
- Bank of America
- Suntrust
- The Future of BD's Client Experience
- Black Diamond

Google

All You Need to Know About Last Night's 2020 Democratic Debate - The New York Times
Oct 16th, 2019

Turkey's leader rebuffs US call for Syria ceasefire, says he'll meet Pence, not just Trump - USA TODAY
Oct 16th, 2019

White House directed 'three amigos' to run Ukraine policy, senior State department official tells House investigators - The Washington Post
Oct 16th, 2019

Pete Buttigieg and Beto O'Rourke's feud over assault weapon buybacks boils over at the Democratic debate - Vox.com
Oct 16th, 2019

View your top holdings at a glance

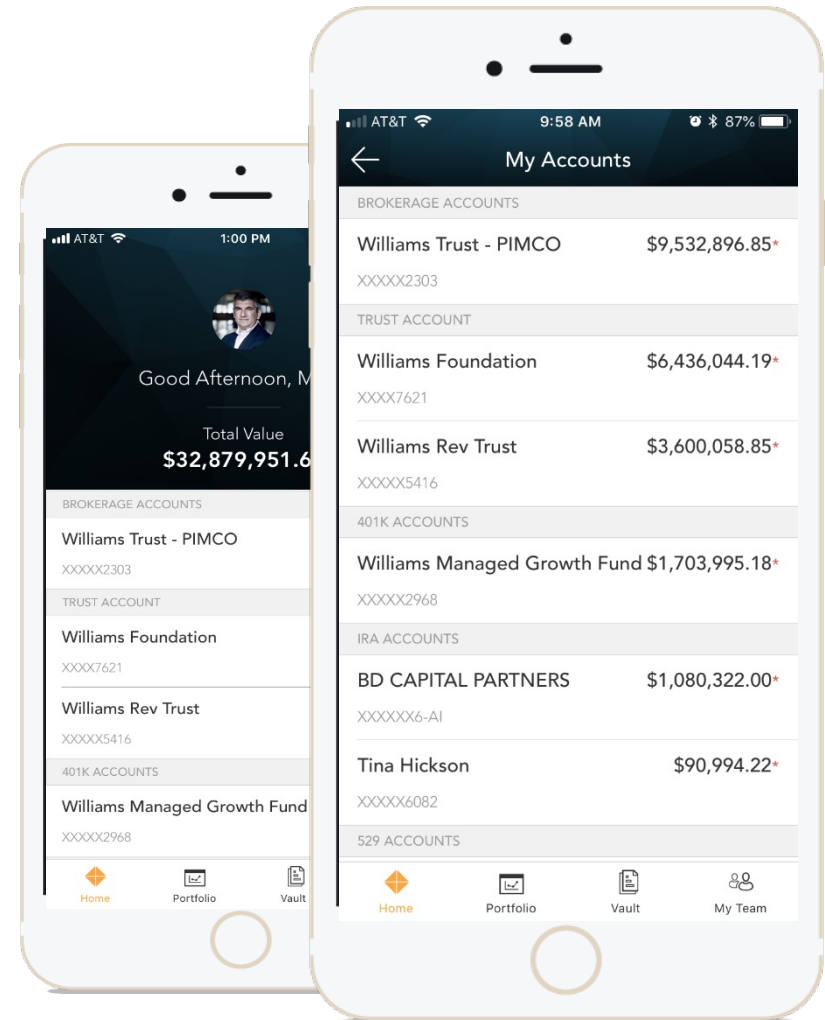
Use the quick links we have provided to view our latest blog posts, events etc

We have provided you more links to latest news feeds to provide rich information within your portal!

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. You can expand each account to see your holdings and their individual values.

The Balance Sheet page provides you a break down of your net worth by assets and liabilities. Capture your full financial wealth in one place!



My Accounts

HOME NET WORTH ▼ PORTFOLIO ▼ TIMELINE VAULT

Accounts

\$5,017,475.46

Total Value

12 Accounts

0 Added Institutions

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

Add Account

My Accounts: 12

Collapse All

Account Number	Account Name	Custodian	Value ▼	As of Date	Last Updated
> XXXXX2263	Rogers Family Trust	Fidelity IWS	1,497,107.51	12/31/2015	--
> XXXXXXHOME	Rogers Family Home	Manual Account	1,100,000.00	12/31/2015	--
> XXXXX8865	Rogers FI Strategy	MorganStanley	799,952.63	12/31/2015	--
> XXXXX8-AI	BD Capital Partners	Alternative Investme...	756,440.72	12/31/2015	08/03/2015
> XXXXX1886	Rogers Joint Account	Schwab PC	601,201.59	12/31/2015	--
> XXXXX68EC	Nick Rogers IRA	National Financial	288,301.53	12/31/2015	--
> XXXXX5090	Rogers & Co.	TD Ameritrade	180,782.31	12/31/2015	--
> XXXXX1639	Rogers Irrevocable Trust	Pershing Advisory So...	149,083.21	12/31/2015	--
> XXXXX6736	Rogers Individual	LPL Financial Accounts	49,901.19	12/31/2015	--
> XXXXX9539	Rogers 529	Pershing Advisory So...	41,126.11	12/31/2015	--
> XXXXXXAMEX	Rogers American Express	Manual Account	-65,000.00	12/31/2015	--
▼ XXXXXXXXXXXGAGE	Rogers Primary Mortgage	Alternative Investme...	-381,421.35	12/31/2015	--

Asset Name	Symbol	Value	Units @ price	Last Updated
Rogers Primary Mortgage	1388_ROGERS_MTGE	-381,421.35	-381,421 @ \$1.00	12/31/2015

Click on accounts to view holding level detail

Balance Sheet

Export your data table directly to excel

Balance Sheet

As of 12/31/2015 ▼

↓ Export

Add Account

TOTAL NET WORTH
\$5,017,475.46

ASSETS \$5,463,896.81

LIABILITIES \$446,421.35

Total Net Worth

Name	Allocation %	Tax Status	Joint	Trust	Other	Total
▼ Net Worth	--		\$1,506,725.52	\$2,777,889.83	\$732,860.11	\$5,017,475.46
▼ Assets	100%		\$1,506,725.52	\$2,777,889.83	\$1,179,281.46	\$5,463,896.81
▼ Investment Accounts	80%		\$1,506,725.52	\$1,677,889.83	\$1,179,281.46	\$4,363,896.81
▼ Brokerage	12%		\$601,201.59		\$49,901.19	\$651,102.78
XXXXX1886 - Rogers Joint Account	11%	Taxable	\$601,201.59			\$601,201.59
XXXXX6736 - Rogers Individual	1%	Taxable			\$49,901.19	\$49,901.19
▼ Retirement	20%				\$1,088,254.16	\$1,088,254.16
XXXXX68EC - Nick Rogers IRA	5%	Tax-Deferred			\$288,301.53	\$288,301.53
XXXXX8865 - Rogers FI Strategy	15%	Taxable			\$799,952.63	\$799,952.63
▼ Trust	30%		\$149,083.21	\$1,497,107.51		\$1,646,190.72
XXXXX2263 - Rogers Family Trust	27%	Taxable		\$1,497,107.51		\$1,497,107.51
XXXXX1639 - Rogers Irrevocable Trust	3%	Taxable	\$149,083.21			\$149,083.21
▼ Education	1%				\$41,126.11	\$41,126.11
XXXXX9539 - Rogers 529	1%	Tax-Deferred			\$41,126.11	\$41,126.11
▼ Corporate	3%			\$180,782.31		\$180,782.31
XXXXX5090 - Rogers & Co.	3%	Taxable		\$180,782.31		\$180,782.31
▼ Partnerships	14%		\$756,440.72			\$756,440.72
XXXXXX8-AI - BD Capital Partners	14%	Taxable	\$756,440.72			\$756,440.72
▼ Real Assets	20%			\$1,100,000.00		\$1,100,000.00
▼ Real Estate	20%			\$1,100,000.00		\$1,100,000.00

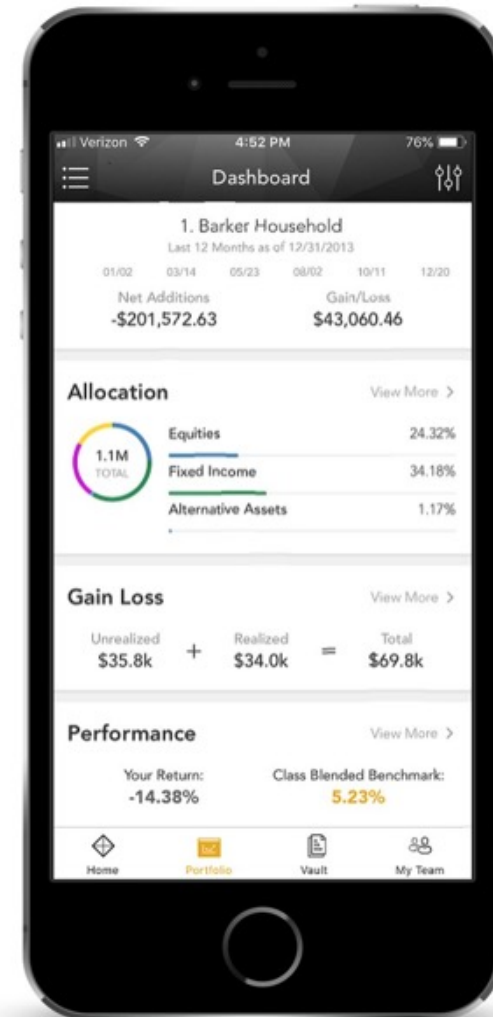
View a quick break down of your total net worth's assets and liabilities

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

Rogers Family ▾

Filter

Activity Summary >



Beginning Value	3,638,764.70
Net Additions	242,897.54
Gain/Loss	100,813.21
Ending Value	3,982,475.46

Allocation >



Group By: Classes ▾

Equities	58%	2,302,709.73
Fixed Income	26%	1,031,065.75
Alternative Assets	10%	394,600.65
Cash & Equivalents	6%	245,141.14
Unclassified	0%	8,958.79

Quarter To Date as of 12/31/2015



Update Supervised and Performance Return settings

Net Worth >

Your Net Worth

5,017,475.46

Assets



Investment Accounts	80%
Real Assets	20%

Liabilities



Total Loans	100%
-------------	------

Performance >

Rogers Family

2.65%



Gain Loss >

Unrealized			Realized		Total
1.8M	+		-43.7K	=	1.8M
Unrealized Gain/Loss					1,805,876.70
% UGL					31.55%
Short-Term					249,116.05
Long-Term					1,556,760.65
Realized Gain/Loss					-43,662.01
% RGL					-35.87%
Short-Term					-10,183.78
Long-Term					-33,478.24

Transactions >

Date	Type - Symbol	Amount
12/31/15	Management Fee - CASH	-122.70
12/31/15	Management Fee - CASH	-122.70
12/31/15	Management Fee - CASH	-65.26
12/31/15	Income Reinvestment - GMBXX	0.11
12/31/15	Dividend - GMBXX	0.11
12/31/15	Buy - GMBXX	0.11
12/31/15	Management Fee - CASH	-444.81
12/31/15	Management Fee - CASH	-444.81
12/31/15	Management Fee - CASH	-236.55
12/31/15	Management Fee - CASH	-692.30

Activity Summary

View activity and changes in your portfolio or account balance

12/13/2013

Net Additions: 30,477,813

Market Value: 32,456,714

Activity Summary >



Beginning Value 26,243,713

Net Additions 3,870,901

Gain/Loss 2,765,338

Ending Value 32,879,952

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

(Consolidated View)

View breakout of additions and withdrawals

See income and performance breakouts

Toggle to view either summary detail or transactions

Williams Family ▾

Filter

Year To Date as of 12/31/2013



< Activity Summary

Collapse Chart

Beginning Value 26,243,713

Net Additions 3,870,901

Contributions 7,129,624

Withdrawals -2,509,235

Other Activity -499,856

Fees -249,631

Gain/Loss 2,765,338

Market Change 1,584,522

Income 1,180,816

Ending Value 32,879,952



View: Account Summary ▾

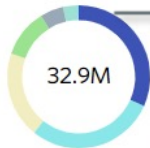
Name ▲	Beginning Value	Contributions	Withdrawals	Other Activity	Fees	Market Change	Income	Ending Value
Williams Family	26,243,713	7,129,624	-2,509,235	-499,856	-249,631	1,584,522	1,180,816	32,879,952
Flows between accounts	--	0	0	--	--	--	--	--
XXXX4442 - Williams - Alliance Bernstein	8,713,773	0	-392,195	37,311	-93,314	1,994,253	175,812	10,435,640
XXXX7621 - Williams Foundation	0	6,366,926	0	23,011	-23,011	-179,439	248,558	6,436,044
XXXXX2303 - Williams Trust - PIMCO	10,599,897	0	-1,093,000	34,083	-82,014	-493,382	567,312	9,532,897
XXXXX2968 - Williams Managed Growth	571,979	739,000	0	6,092	-13,744	389,062	11,605	1,703,995
XXXXX5416 - Williams Rev Trust	4,594,879	23,156	-950,098	-10,626	-34,909	-177,618	155,274	3,600,059
XXXXX6082 - Tina Hickson	179,539	300	-73,700	325	-2,640	-14,586	1,756	90,994
XXXXXX6-AI - BD CAPITAL PARTNERS	1,583,646	242	-242	-590,054	0	66,231	20,499	1,080,322

(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%

Hover to view
grouping level
allocation detail

Group By: Account/Class

XXXX4442 - Williams - Alliance Bernstein	31.74%
XXXXX2303 - Williams Trust - PIMCO	28.99%
XXXX7621 - Williams Foundation	19.57%
XXXXX5416 - Williams Rev Trust	10.95%
XXXXX2968 - Williams Managed Growth Fund	5.18%

(Consolidated View)

Change the data grouping
from the dashboard or the
expanded card

Williams Family

Filter

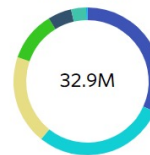
Year To Date as of 12/31/2013

< Allocation

Snapshot Drift

Collapse Chart

Williams Family



XXXX4442 - Williams - Alliance Bernstein	31.74%
XXXXX2303 - Williams Trust - PIMCO	28.99%
XXXX7621 - Williams Foundation	19.57%
XXXXX5416 - Williams Rev Trust	10.95%
XXXXX2968 - Williams Managed Growth Fund	5.18%

< Previous 1 / 2 Next >

Group By: Account/Class Expand Level - Collapse All

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
> XXXX2303 - Williams Trust - PIMCO	--	--	29.0%	9,532,897
> XXXX2968 - Williams Managed Growth Fund	--	--	5.2%	1,703,995
> XXXX5416 - Williams Rev Trust	--	--	10.9%	3,600,059
> XXXX6082 - Tina Hickson	--	--	0.3%	90,994
> XXXXX6-AI - BD CAPITAL PARTNERS	--	--	3.3%	1,080,322

(Expanded View)

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
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

(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
☐ Sells
☐ Management Fees
☐ Expenses

☐ Capital Gains
☐ Income
☐ Alternatives
☐ Other

☐ Contributions
☐ Withdrawals

Apply Cancel

Williams Family ▾

Filter

Year To Date as of 12/31/2013

Settings

Print

< 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/ETD 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/ETD 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	--

Filters - 2 Types

Buy
Sells

Sort column headers to quickly organize your transactions

(Expanded View)

Gain Loss

View realized and unrealized gain/loss information for your investments

Gain Loss >

Unrealized	+	Realized	=	Total
1.4M		9.8K		1.4M
Unrealized Gain Loss				1,380,914
% UGL				5.41%
Short-Term				227,571
Long-Term				1,153,343
Realized Gain Loss				9,785
% RGL				91.32%
Short-Term				--
Long-Term				9,785

(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

Williams Family ▾

Filter

Year To Date as of 12/31/2013 ⚙️ 📄

< Gain Loss

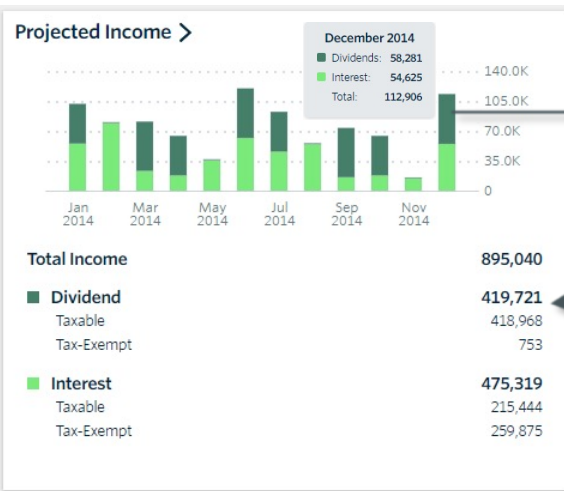
Group By: Account/Class ▾ | Expand Level - Collapse All

Name	Symbol	Open Date	Units	Cost Basis	Price	Accrual	Ending Value	Unrealized ST	Unrealized LT
▼ Williams Family	--	11/26/2008	--	25,504,539	--	170,188	32,879,952	227,571	1,153,343
> XXXXX6-AI - BD CAPITAL PARTNERS	--	11/26/2008	--	658,884	--	0	1,080,322	12,817	408,621
> XXXXX6082 - Tina Hickson	--	01/14/2013	--	74,447	--	28	90,994	2,347	--
> XXXX4442 - Williams - Alliance Bernstein	--	09/10/2012	--	10,087,945	--	0	10,435,640	3,397	173,269
> XXXX7621 - Williams Foundation	--	01/23/2013	--	1,320,139	--	0	6,436,044	-24,283	--
> XXXXX2968 - Williams Managed Growth Fund	--	02/14/2013	--	847,690	--	478	1,703,995	187,223	--
> XXXXX5416 - Williams Rev Trust	--	09/19/2012	--	3,082,653	--	45,822	3,600,059	-7,227	524,632
> XXXXX2303 - Williams Trust - PIMCO	--	11/01/2012	--	9,432,780	--	123,861	9,532,897	53,297	46,820

(Expanded View)

Projected Income

Review a snapshot of expected dividend and interest payments



(Consolidated View)

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

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

View projected income at your grouped level



(Expanded View)

Capital Markets

View independent benchmark information across multiple date ranges

Capital Markets >

Year To Date


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

Williams Family 

 Filter

< 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%

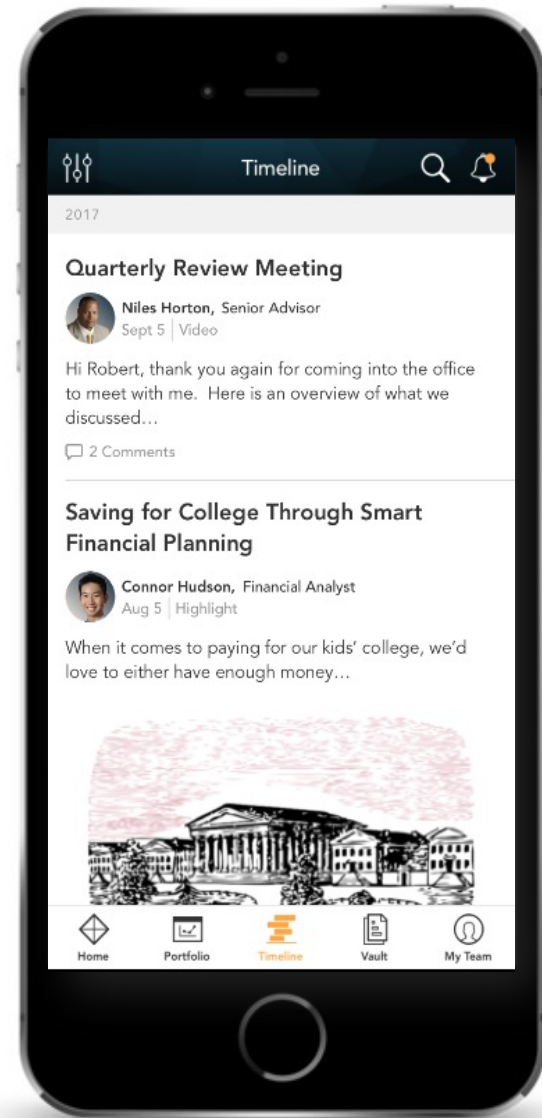
Performance is not correlated to portfolio holding period

(Expanded View)

Relationship Timeline

The Relationship Timeline is a consolidated, curated feed of posts designed to memorialize interactions that occur between you and your team! There are countless events and activities representing your financial life journey and Timeline is a consolidated experience designed to capture this activity over time.

We view this as a great communication tool between you and us!



Relationship Timeline

HOME NET WORTH ▼ PORTFOLIO ▼ TIMELINE VAULT

Timeline

DECEMBER 2018

Search

Search post content and titles

Upcoming Meeting



Erica White, Portfolio Manager

Dec 1, 2018

Good Morning,

In our upcoming meeting we will be discussing the growth of your portfolio in 2018. It has been a volatile year for the markets, but your investments have reaped the benefits. Please bring any and all questions you may have and we'll look forward to having you!

Best Regards,

Your Deliver Wealth Management Team 😊



Matt Fuchs | Nov 16, 2018 1:55 pm

great!



Maritza Paredes | Jun 4, 2019 9:26 pm

Thank you!

NOVEMBER 2018

Breaking Up Is Hard To Do: How To Leave Your Big Name Bank



Nelson Greene, Advisor

Nov 17, 2018



Scroll to see post history



<https://bd3.bdreporing.com>

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About Us

Today, Deliver Wealth Management's commitment to your success is as strong as ever. Our ability to deliver has been strengthened by our vast global portfolio of technology applications and services. Our combined business units deliver innovative solutions to more than 10,000 families and institutions worldwide. Together with our clients, we are continuing to transform the wealth management industry.

My Financial Team



Brad McDonald
Advisor



George Wayne
Advisor



Erica Campbell
Portfolio Manager

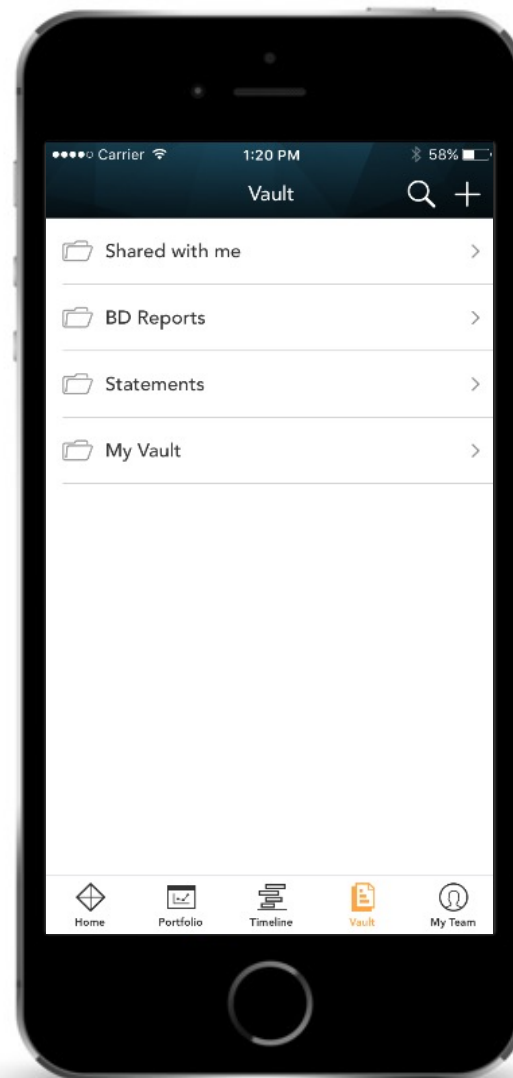
Vault

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

HOME

NET WORTH ▾

PORTFOLIO ▾

TIMELINE

VAULT

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


Quickly edit, move or download your files as needed

Drag and drop your files into the document space to upload

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. ---



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

If you have any questions, please contact us.
Gregg Denhoffer 720-443-7940 or gregg@conexuscap.com
Scott Altschul 954-816-1440 or scott@conexuscap.com

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:



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