



March 2021

To our valued clients:

We are excited to roll out the Black Diamond client portal to all our SAGE Private Wealth Group clients. **This document contains important information about the tool and login information.** As always, please feel free to reach out to our team for any questions via email or by telephone at 630-933-0000.

What is NEW?

Black Diamond is an online secure portal you can now use to access information about your account. This new platform has **secure, easy-access information all in one login** including the following:

1. Benchmarking data through the Portfolio Tracking Tool
 - More accurately track how your various accounts perform versus the appropriate benchmark
 - Tracks versus the appropriate blend of indices on a daily basis, records that performance and adjusts the benchmark blend based on how the portfolio evolves over time
 - Historic and real time accuracy on performance
 - Empowers client to have clarity on how well they are doing versus the market and in context of client goals
2. Easy-to-access & secure storage of important documents (Tax Related, Estate Planning, etc.)
3. Link other accounts, with other custodians, easily to have a dashboard view of your finances
4. Your Financial Life Planning real-time goals and success indicators (rolled out per client)

Our goal is to create more consistency and transparency to empower each of our clients to focus on what truly matters, living your legacy.

If you have any questions, please reach out to your Wealth Advisor.

Thank you,

Khaled Taha
CEO & Managing Partner
Wealth Advisor