Frequently Asked Questions

Welcome to SAGE Private Wealth Group! The following list of FAQs provides clarification on some items related to the SAGE Black Diamond Client Portal. We are excited about this new tool and the engagement in clients using it over the past few days.

How will the Black Diamond Portal benefit me as your client?

Black Diamond provides for a secure and easily accessible client experience all under one login. Features include a personal, on-demand look at performance, allocations, account activity, and more. Also, Black Diamond provides benchmarking data through their Portfolio Tracking Tool, easy-to-access and secure storage of important files, the ability to link accounts from other financial institutions allowing for a dashboard view of your finances, and an overview of your SAGE Financial Life Plan with real-time goals and success indicators.

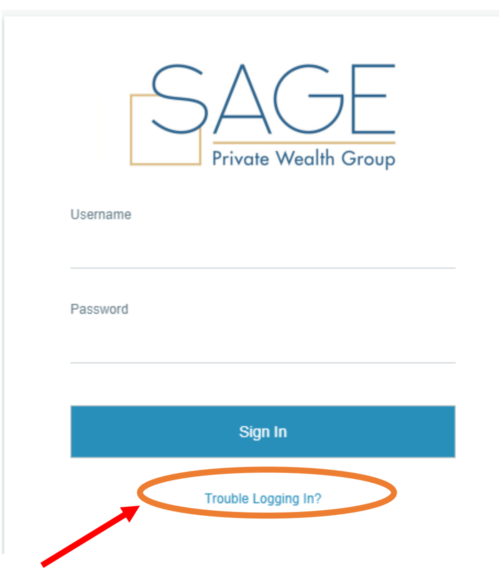
How long do I have to log into the Black Diamond Portal?

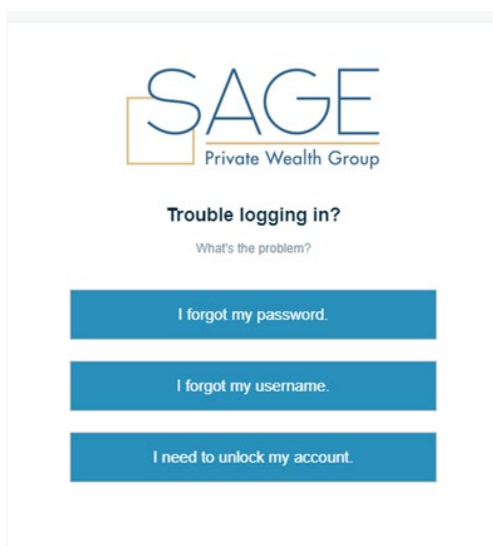
It is ideal that clients login to the portal within seven days of receiving the initial invite (March 31, 2021). We know everyone is busy, so if you try to login after the registration window has closed, simply let your Wealth Advisor know. He/she will reset your login, and they will send another email your way.

We are rolling out various features of the portal gradually starting with the basics to allow everyone to get used to the tool. Over the next several months, we will be adding additional features to the portal and provide subsequent training. For example, for those with a SAGE Financial Life Plan, that feature will be rolled out over time on a per-client basis. Meanwhile, we are working on integrating your other financial data (such as bank accounts, 401(k)'s, and annuities) in the coming months. Our objective is for our Black Diamond Portal to be the secure, easy-to-access dashboard repository for all your financial data.

What if I forgot my username or password?

On the sign-in screen, click "Trouble Logging In?". From there, you will be able to select "I forgot my password", "I forgot my username", or "I need to unlock my account".





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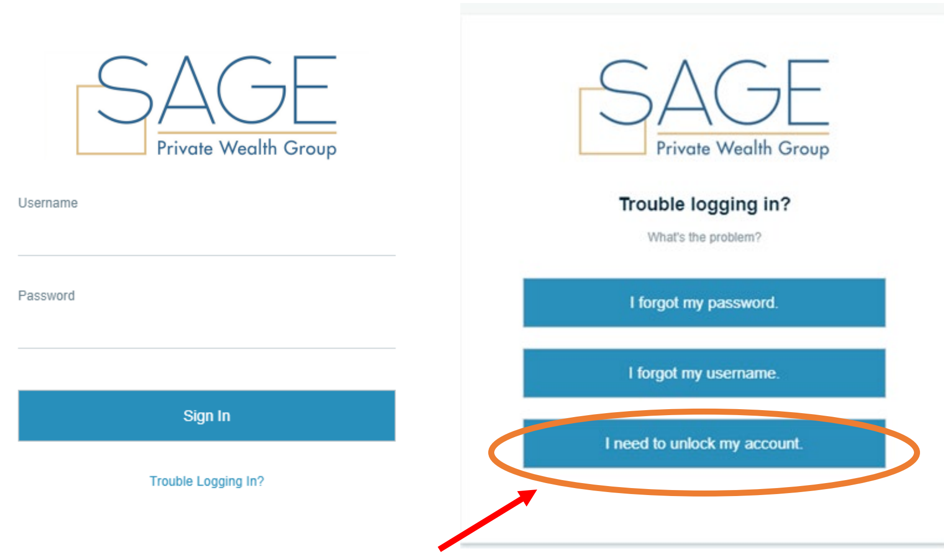
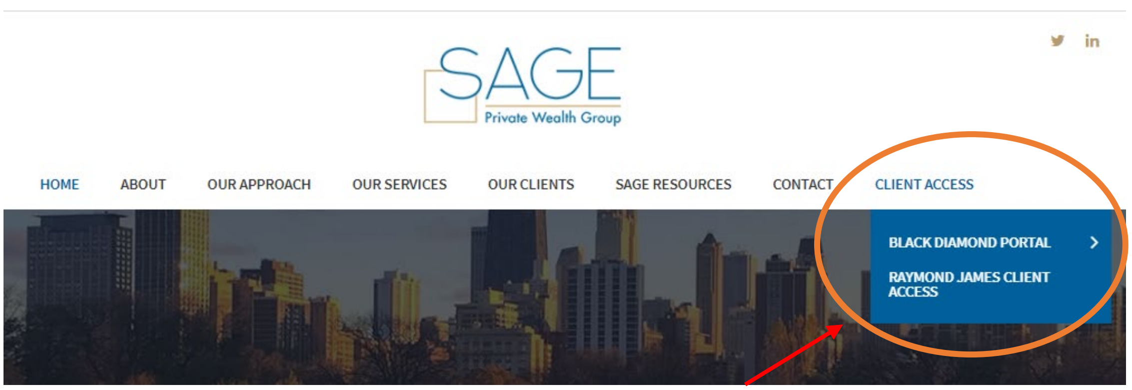
How many times can I try logging in before my account gets locked? How do I unlock it?

You will have three attempts to log in before your account gets locked. If your account is locked, click "[Trouble Logging In?]" on the sign-in screen. Then select "I need to unlock my account".



Will I continue to receive my statements from my custodian?

Yes. You can still access your custodian's client portal as usual through our website, SAGEprivatewealth.com, by choosing the custodian's Client Access from the CLIENT ACCESS drop-down list from the top menu. However, we plan on fully integrating Black Diamond over the next several months so that it will act as your central repository for all your financial needs.



How will this change affect the personalized service I am accustomed to receiving?

You should expect the same level of attention and personalized service you had previously received from your advisor with the added benefit of this new tool. Our focus on personalized service and boutique-firm accessibility for our clients will continue to be our top priority, coupled with a large firm's intellectual capital.

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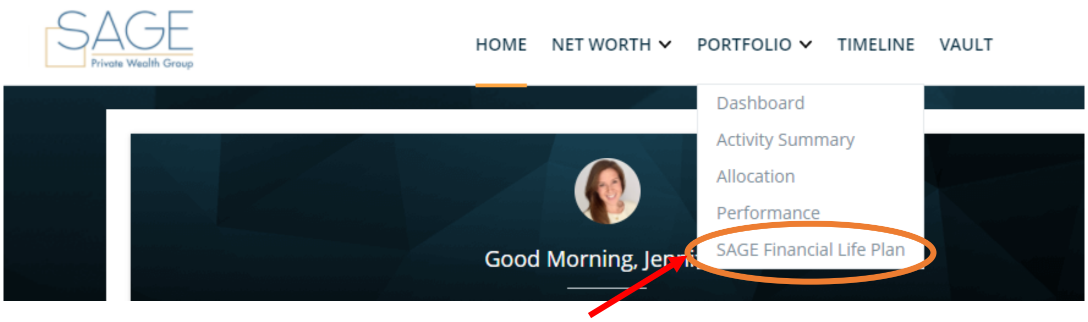
I have developed a SAGE Financial Life Plan - where is that information on the Black Diamond Portal?

Your customized SAGE Financial Life Plan results will be displayed on your Portfolio Dashboard. This feature will be rolled out on a per-client basis upon your plan's update or completion.



When will I see all my financial information such as credit cards, 401(k)'s, and bank accounts?

We are currently working on the integration between your other financial accounts and the Black Diamond Portal. Other financial accounts would include bank accounts, 401(k)'s, credit cards, annuities, mortgages, etc. Once the integration feature is available, clients will have the ability to add their accounts from other financial institutions in their Client Portal. While most institutions participate in the aggregation feature, some have chosen to opt-out or do not have the technological capabilities, so complete aggregation may not be possible in a few rare instances.

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