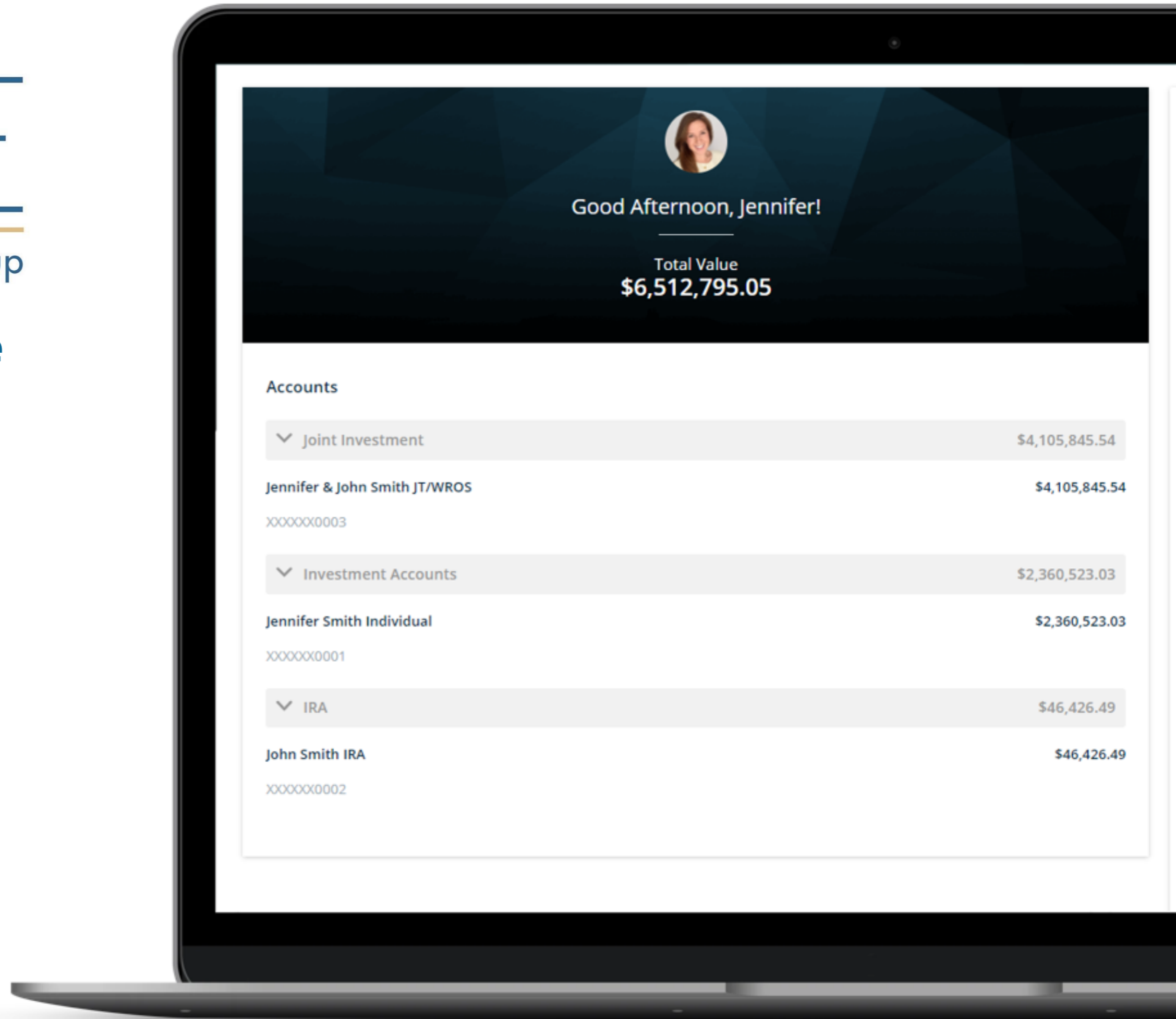




New User Setup Guide

**GAIN ACCESS TO YOUR
PERSONAL FINANCIAL
PORTAL TODAY**



1.

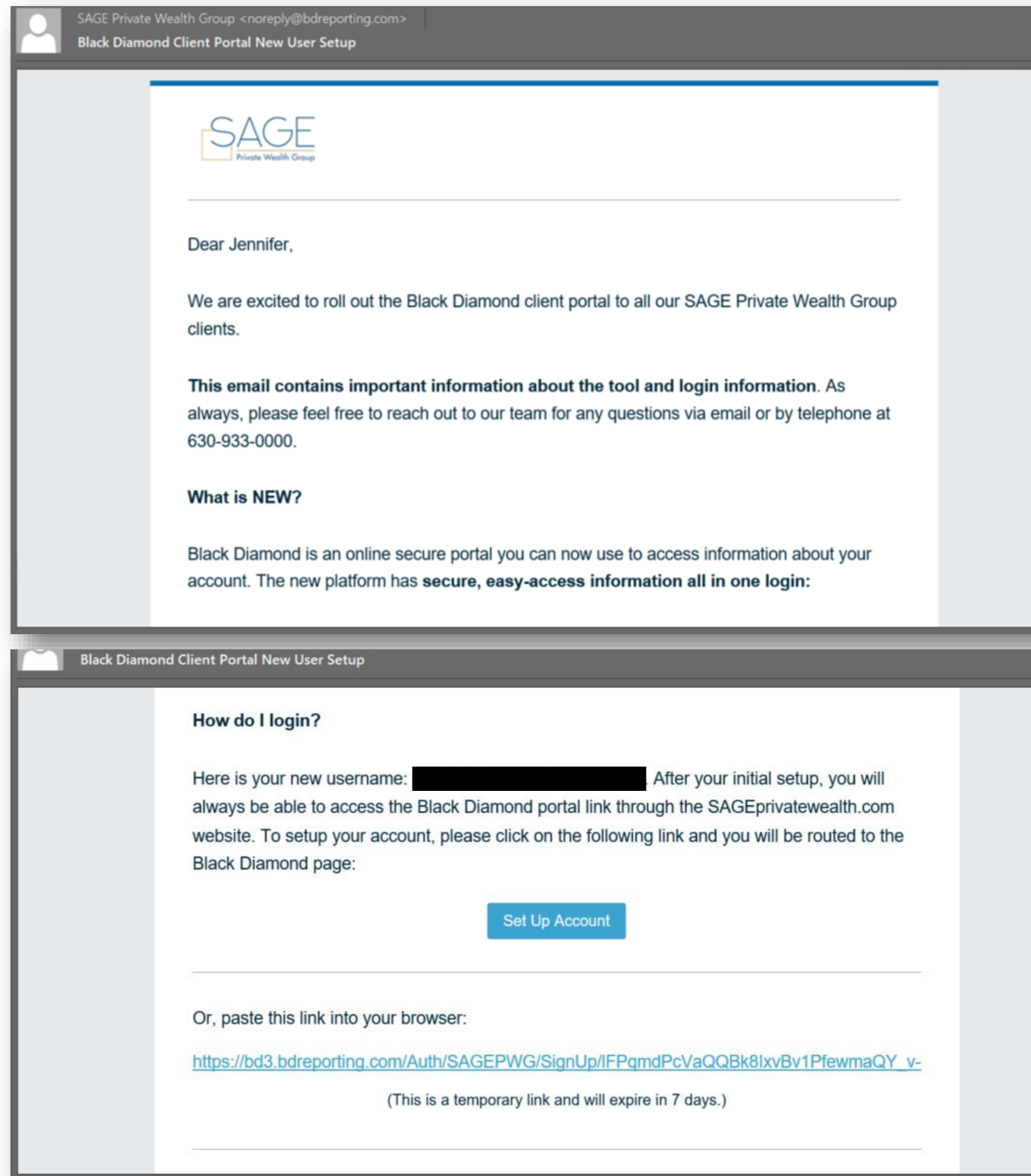
You will receive a “Black Diamond Client Portal New User Setup” email similar to the example shown here.

This email will come “from” SAGE Private Wealth Group and a “no reply” email address of noreply@bdreporting.com.

Included at the bottom of this email is a link to set up your account. Please click on the “Set Up Account” button or, copy and past the full URL into your browser.

For security purposes, your set up link will expire after 7 calendar days.

Should the link expire, let us know and we will be happy to resend the email with a new set up link.



2.

Upon clicking the link within the email (or copying and pasting the URL into your browser), you will be prompted to set security questions.

It is required you choose a security question from the preexisting lists and set up all three questions. Security questions are not case sensitive.

To continue, click “Next.”

The screenshot shows the 'Set Security Questions' page for SAGE Private Wealth Group. At the top is the SAGE logo with 'Private Wealth Group' underneath. The title is 'Set Security Questions' in bold. Below the title is a sub-header: 'Please pick 3 security questions and their answers for use if you forget your password.' The page contains three identical sections for setting security questions. Each section has a dropdown menu for 'Security Question1', 'Security Question2', and 'Security Question3'. Below each dropdown is a text input field for the 'Answer', with a small eye icon to its left. At the bottom right of the form is a blue 'Next' button. At the very bottom of the page is the copyright notice: '© 2021 Black Diamond - an independent business unit of Advent Software'.

3.

Next you will need to set a secure password.

Please enter a chosen password in the first form field. Then re-type your password in the second form field under “Confirm Password.”

If your password meets security requirements (at least 8 characters long, at least 1 upper case letter and at least 1 number) and matches between the two form fields, you may then click “Next.”

The screenshot shows the 'Set Password' page for SAGE Private Wealth Group. At the top is the SAGE logo with 'Private Wealth Group' underneath. The title is 'Set Password' in bold. Below the title is a sub-header: 'Please pick a secure password and confirm it.' The page contains two password input fields. The first is labeled 'Password' and the second is labeled 'Confirm Password'. Both fields have a small eye icon to their left. At the bottom right of the form are two buttons: a white 'Back' button and a blue 'Next' button. At the very bottom of the page is the copyright notice: '© 2021 Black Diamond - an independent business unit of Advent Software'.

4.

The final step is to read through and accept the “Application Terms of Use.”

After accepting, you will be automatically directed to your personalized client portal!

At this time, you will also receive a second email letting you know your password has been updated.

This email will once again come “from” SAGE Private Wealth Group and a “no reply” email address of noreply@bdreporting.com.

Application Terms of Use

This Application Terms of Use (these “Terms”) is a legal agreement between you, the end user, and Advent Software, Inc., acting through its Black Diamond Performance Reporting division, and its affiliates (“Black Diamond”). Black Diamond is a division of Advent Software Inc. (“Advent”). The terms “you”, “your”, and “I” herein refer to, as applicable, the individual or organization accepting these Terms. If you are representing your organization, you are accepting these Terms for yourself and on behalf of your organization. You represent that you have full authority to bind your organization to these Terms and agree on behalf of your organization that it is responsible for all access to and use of the Application by end users who obtain access to the Application through your organization. You and your organization acknowledge and agree that Black Diamond has relied on the foregoing representation in permitting you and your organization’s end users to access and use the Application. PLEASE READ THE FOLLOWING TERMS CAREFULLY BEFORE ACCESSING OR USING THE APPLICATION OR THE BDREPORTING.COM WEBSITE.

Black Diamond makes available its services and related technology under an agreement with its customer (the “Customer Agreement”) and, pursuant to such Customer Agreement and subject to these Terms, may make available certain of those services and technology to you. You acknowledge and agree that the Customer Agreement is solely for the benefit of Black Diamond and its customer and that neither you nor any investor, advisor, or other person or entity, is a beneficiary, intended or otherwise, of the Customer Agreement.


By clicking the “Accept” button or accessing or using Black Diamond’s then-current version of the proprietary application located at bdreporting.com (or such other internet address as Black Diamond may designate from time-to-time)(the “Application”) in any way, including without limitation, using any information, and/or submitting any content or personal information via the Application, you agree to and are bound by the terms, conditions, policies and notices contained in these Terms, including without limitation conducting this transaction electronically, third party terms and conditions, disclaimers of warranties, damage and remedy exclusions and limitations, and the choice of Florida law, without regard to its conflicts of laws principles. Black Diamond may modify these Terms from time to time and may notify you of such modifications by any reasonable means, including by posting the revised Terms on the Application. Any such modification will not apply to any dispute between you and us arising prior to the date on which we posted the revised Terms incorporating such modifications, or otherwise notified you of such changes. Please review the “Last Updated” legend at the top of these Terms to see when these Terms were last revised. Updates that are (i) required by law, government authorities or regulatory bodies, (ii) required by vendors, or (iii) do not materially impact your use of the Application will apply immediately. All other changes to these Terms will become effective three (3) business days after the revised Terms have been posted on the Application. **Your continued access to or use of the Application following these changes means that you accept the revised Terms.**

If you do not want to agree to these Terms, you should click the “Decline” button and immediately cease your access and use of the Application and the bd3.bdreporting.com website.

1. Grant of License.

In exchange for your agreement to these Terms, Black Diamond grants you a limited, non-exclusive, non-transferable, revocable license, without right of sublicense, to use the Application solely in the United States and solely for your own personal, non-commercial, informational purposes, subject to the terms of any applicable agreement between you and Black Diamond. You agree that you shall only use the Application in a manner that complies with

SAGE Private Wealth Group <noreply@bdreporting.com>
Account Update Confirmation



Dear Jennifer,

This is a courtesy notification that your SAGE Private Wealth Group password has been updated for username: [REDACTED] If you did not make any recent changes to your account, please contact your system administrator.

Thanks,
SAGE Private Wealth Group



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

630.933.0000