SAGE
Private Wealth Group

New User Setup Guide

GAIN ACCESS TO YOUR PERSONAL FINANCIAL PORTAL TODAY

Good Afternoon, Jennifer!

Total Value
$6,512,795.05

Accounts

|	
⌄ Joint Investment	$4,105,845.54
Jennifer & John Smith JT/WROS	$4,105,845.54
XXXXXX0003	
⌄ Investment Accounts	$2,360,523.03
Jennifer Smith Individual	$2,360,523.03
XXXXXX0001	
⌄ IRA	$46,426.49
John Smith IRA	$46,426.49
XXXXXX0002	
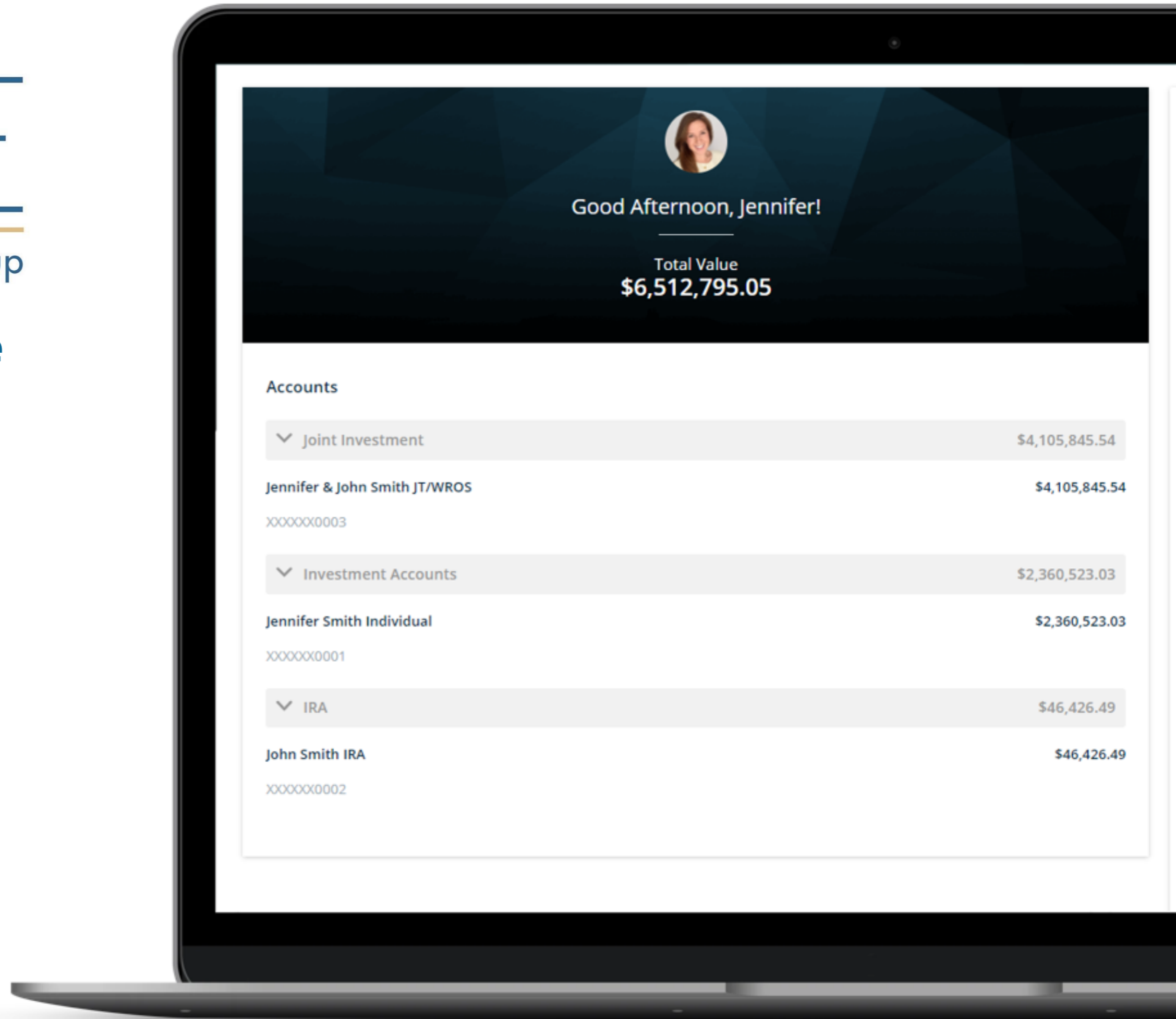
1.

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.
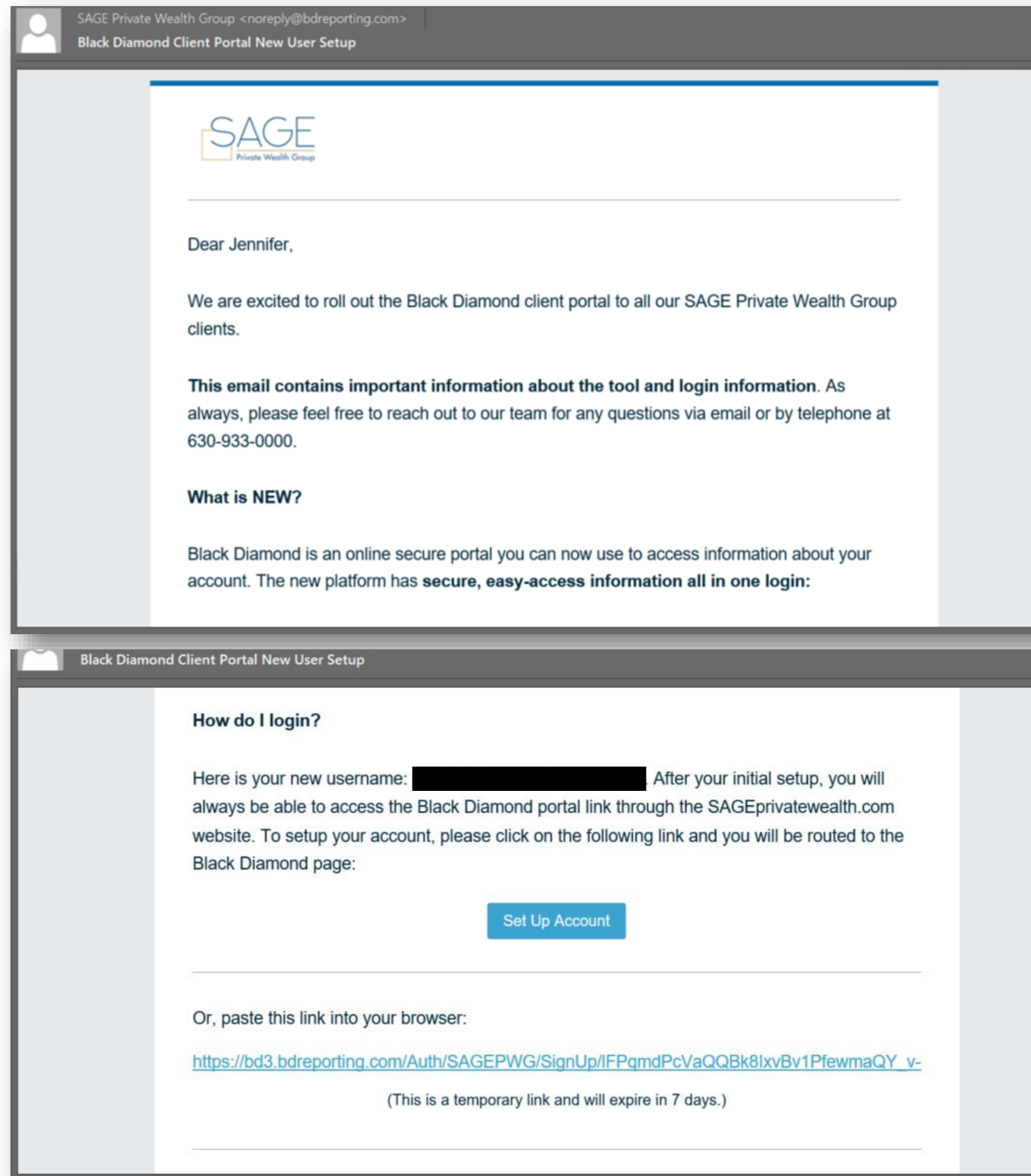
2.

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."

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."

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.

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

630.933.0000