

# Black Diamond Portal New User Guide



Below you will find step-by-step instructions to sign up for access to the client portal and a sneak peek at some of the new features available.

The Black Diamond Portal can be accessed via their website here:

<https://login.bdreporting.com/Auth/SignIn>

You can always access through the [Joslin Capital Website](#) by clicking the Client Access link  in the upper right hand corner.

The portal is also available via mobile app. Search for "Black Diamond Wealth Platform" and look for this logo 

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## Step one

Check your email for a message from Black Diamond titled **New User Setup**. Click on the blue button to set up your account: 

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## Step two

Set your security questions which will be used each time you login for verification (Two Factor Authentication) and if you forget your password.

Click  to continue.

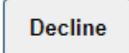
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## Step three

Create a unique password. Your password needs to be at least 8 characters long and contain 1 upper case letter and 1 number. Click  to continue.

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## Step four

Agree to the terms of service for the site by clicking Accept here  

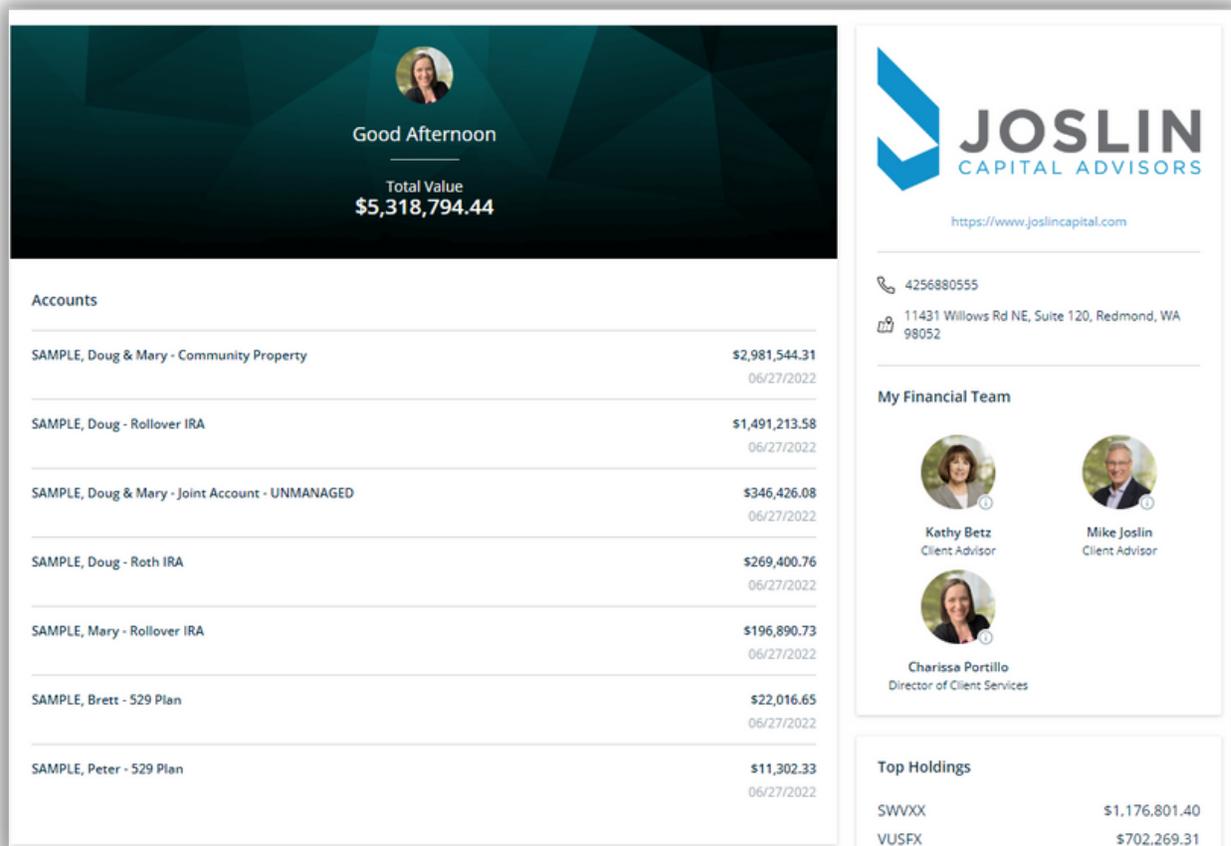
You will then be sent to the homepage and have completed the set up process.

# Black Diamond's New Features

Here are just some of the new features available on the client portal.

## Home Page

The home page will list all your accounts on the portal with previous business day's values. You will also find contact information for our office, your top holdings and links to our website, blog and Schwab login. Click on the various drop downs on the navigation bar at the top of the screen to access the other pages of the portal.



The screenshot shows the client portal home page. At the top, there is a dark teal header with a user profile picture, the text "Good Afternoon", and a "Total Value" of **\$5,318,794.44**. Below this is a table of accounts. To the right, there is contact information for Joslin Capital Advisors, including a phone number, address, and website. Below that is a "My Financial Team" section with three advisors: Kathy Betz, Mike Joslin, and Charissa Portillo. At the bottom right, there is a "Top Holdings" section listing SWVXX and VUSFX.

| Accounts  | Value          | Date       |
|---|----------------|------------|
| SAMPLE, Doug & Mary - Community Property        | \$2,981,544.31 | 06/27/2022 |
| SAMPLE, Doug - Rollover IRA                     | \$1,491,213.58 | 06/27/2022 |
| SAMPLE, Doug & Mary - Joint Account - UNMANAGED | \$346,426.08   | 06/27/2022 |
| SAMPLE, Doug - Roth IRA                         | \$269,400.76   | 06/27/2022 |
| SAMPLE, Mary - Rollover IRA                     | \$196,890.73   | 06/27/2022 |
| SAMPLE, Brett - 529 Plan                        | \$22,016.65    | 06/27/2022 |
| SAMPLE, Peter - 529 Plan                        | \$11,302.33    | 06/27/2022 |

**My Financial Team**

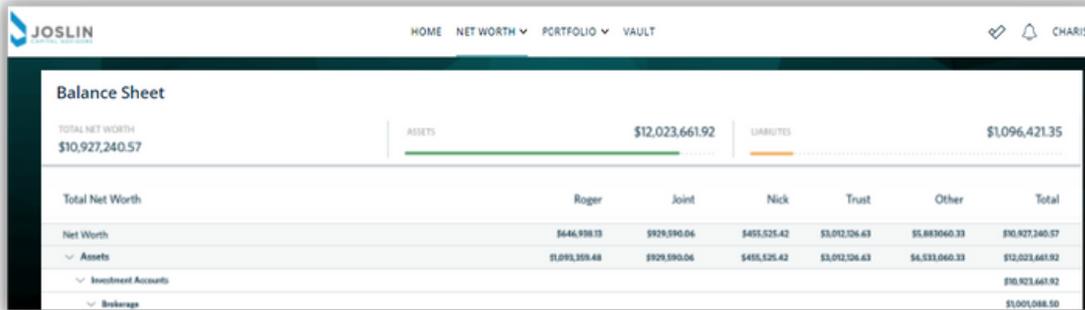
- Kathy Betz, Client Advisor
- Mike Joslin, Client Advisor
- Charissa Portillo, Director of Client Services

**Top Holdings**

|       |                |
|-------|----------------|
| SWVXX | \$1,176,801.40 |
| VUSFX | \$702,269.31   |

## Net Worth

Here you will have access to a **Balance Sheet** that will list out all the assets and liabilities that have been entered on the Black Diamond system. Click the **Accounts** section from the drop down menu for a list of all your accounts with current values.



| Balance Sheet       |                 |              |              |                |                |                 |
|---------------------|-----------------|--------------|--------------|----------------|----------------|-----------------|
| TOTAL NET WORTH     | \$10,927,240.57 |              |              |                |                |                 |
| ASSETS              | \$12,023,661.92 |              |              |                |                |                 |
| LIABILITIES         | \$1,096,421.35  |              |              |                |                |                 |
| Total Net Worth     |                 |              |              |                |                |                 |
|                     | Roger           | Joint        | Nick         | Trust          | Other          | Total           |
| Net Worth           | \$446,938.13    | \$929,590.04 | \$455,525.42 | \$3,012,126.63 | \$5,883,040.33 | \$10,927,240.57 |
| Assets              | \$1,093,359.48  | \$929,590.04 | \$455,525.42 | \$3,012,126.63 | \$4,533,060.33 | \$12,023,661.92 |
| Investment Accounts |                 |              |              |                |                | \$10,923,661.92 |
| Brokerage           |                 |              |              |                |                | \$1,000,000.00  |

## Net Worth - Add Accounts Feature

From either the **Balance Sheet** or the **Accounts** page you will have the option to add outside accounts via the **Add Account** button. This is a way for you to view all your accounts in one place. Adding an outside account does NOT mean that we are managing or have any control over the accounts added. Please contact us if you are interested in having us advise on any additional accounts.

**Institution Accounts** are accounts that you login to view through a third party site. **Manual Accounts** gives you the option of adding in any asset with a static value.

Click accept on this pop up screen and follow the prompts.

*A few items to note for institution accounts:*

- For any accounts added, please email us the registration and type of account.
- If statements are available, please send so we can properly classify all positions so they are displayed correctly on the client portal
- Accounts that require two factor authentication for each login may not link.
- We may be notified of credential errors and will reach out to you to login again.

### Institution Accounts

Add outside accounts to get a more complete picture of your finances.

[Find your Institution](#)

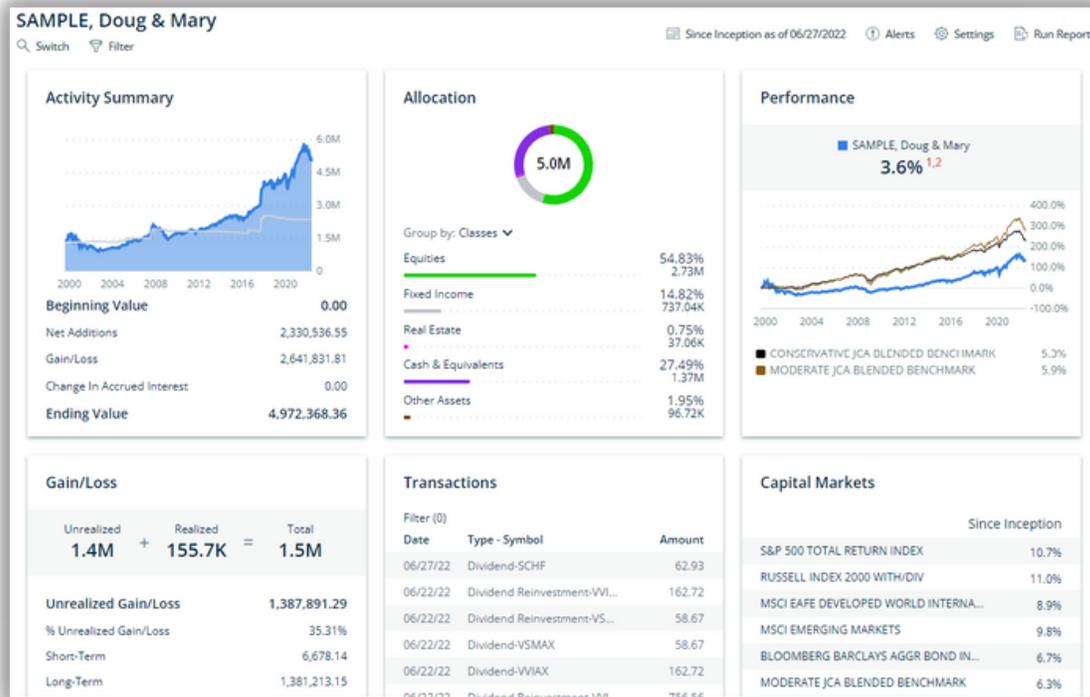
### Manual Accounts

Having trouble finding your institution? Tap the button below to manually add an asset or liability.

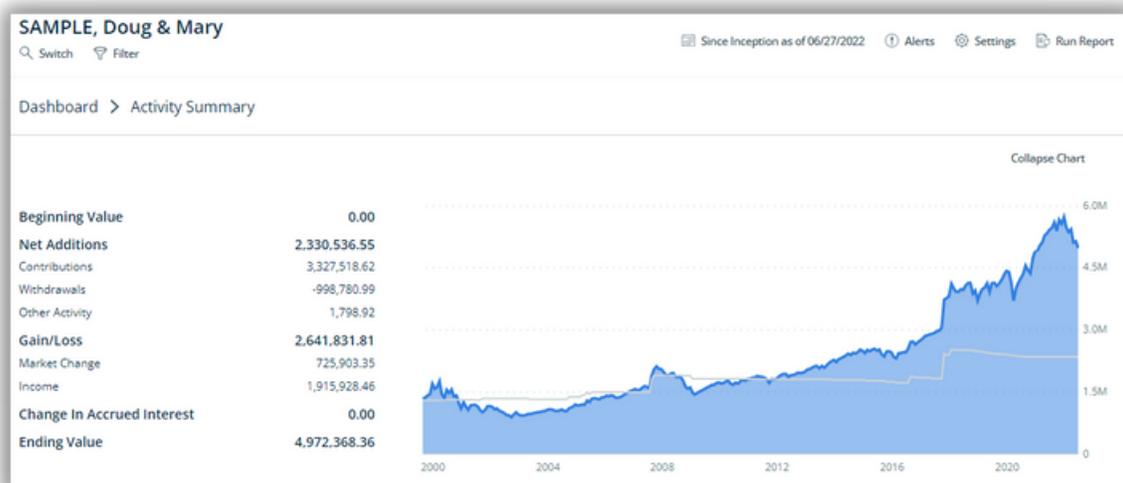
[Add Asset or Liability](#)

## Portfolio - Dashboard

The Portfolio Dashboard offers a variety of cards with information at a glance.



You can click on each individual card for more detailed information.

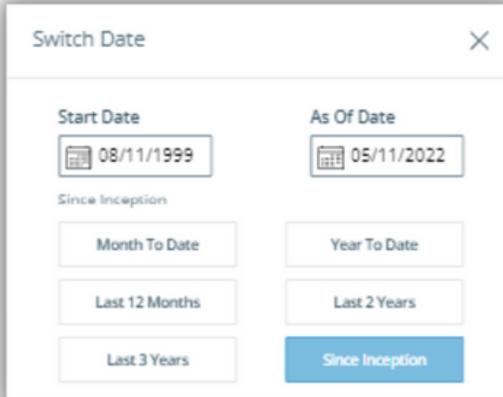
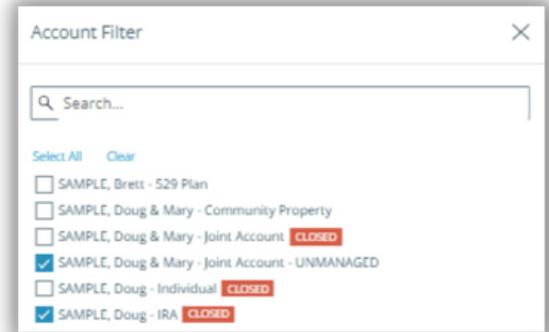


## Portfolio - Dashboard (cont)

Click the **Filter** button under your name to see data on any 1 (or more) particular accounts at a time, rather than seeing data for all of your accounts together

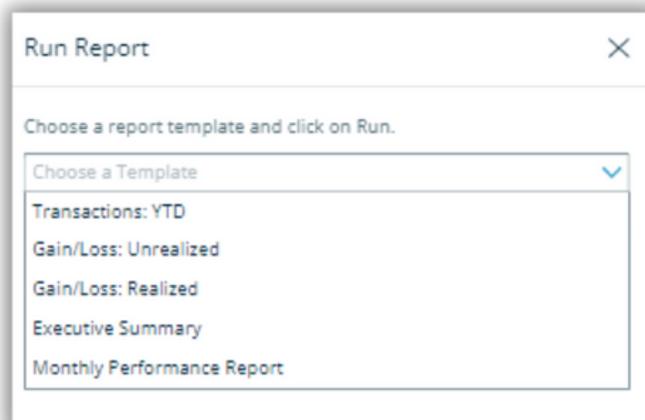
**SAMPLE, Doug & Mary**

🔍 Switch 🗑️ Filter



Clicking here  [Since Inception as of 05/11/2022](#) will bring up the **Switch Date** window which will give you the ability to filter the data and reports by various dates.

Use the **Run Report** feature to run various on demand reports. Here is a listing of the reports available:



***Tip: If you have made any changes to filters or date ranges, those will stay in place until you change them.***

## Vault

The **Vault** will replace Clientview as our document storage and sharing hub. Here you will find your Schwab statements, monthly performance reports and billing statements. You can securely store wills, trust documents and health care directives that you can easily access. ***Using the Vault to upload/download documents is more secure than sending via e-mail.***

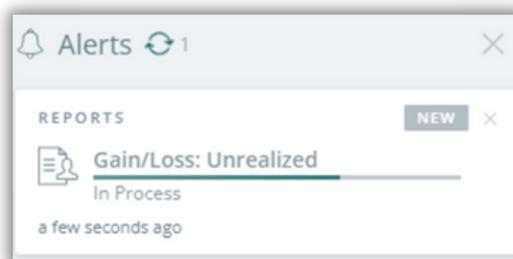


## To-Dos

The **To-Dos** can be accessed by clicking this logo  on the upper right hand side of the page. Here we may post notices of outstanding items to be completed or even reminders of upcoming appointments.

## Alerts

The **Alerts** can be accessed by clicking this logo  on the upper right hand side of the page. Here you will see status updates on existing reports and notices when new items are posted to your vault.



## Signing Out

You can log out of your portal anytime by clicking your name in the upper right hand corner of the page.

# Black Diamond Portal - FAQs

## Login/User Setup

### How do I access the portal after the initial login setup?

The Black Diamond Portal can be accessed via their website here:

<https://login.bdreporting.com/Auth/SignIn>

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### I can't find my Black Diamond Invite Email

Please check your spam/junk folder. If you still cannot find it, please email us to have it resent.

### The security question is the same during the day

Your two-factor security question changes every 24 hours.

## Reports/Accounts

### Can I have access to view accounts that I am the trustee of?

Yes, if you are the trustee on an account or have other family members who have granted you permission to view their account information, we can add these accounts to your portal. Please email us if there are accounts that we need to add.

### Will I receive performance data for accounts that I add to the portal?

No, performance data is only available for assets we advise on. If there is an account you would like to add to your advised assets, please contact our office for more information.

### Why is the cash listed on the Top Holdings not the same as on the asset allocation page?

Cash on the asset allocation page is also capturing the cash held within the individual positions within any given portfolio.

### Why are my full account numbers not listed on my reports?

We have intentionally masked part of the account numbers for security purposes.

### Are unsupervised (i.e. unmanaged) accounts included in performance data?

Unsupervised accounts do not receive performance data on the monthly performance PDFs – though, they do receive a line-item showing the value of such accounts.

### Is there a "help" button if I have questions?

Because the portal is so customized, they do not have a help button. Please email or call our office with any questions.