

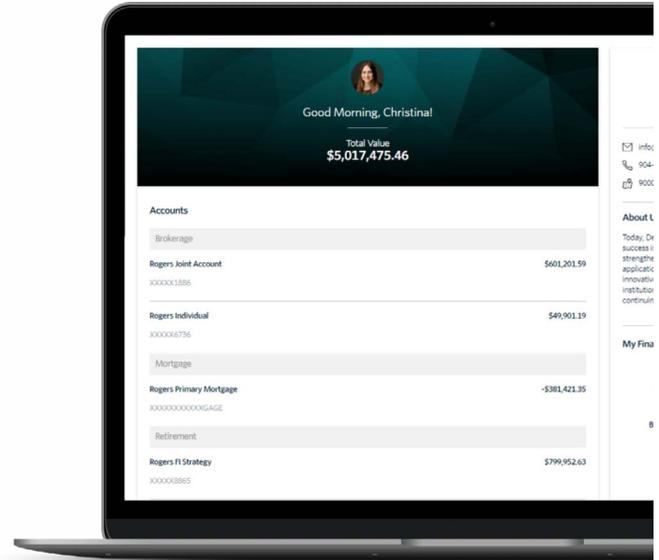


Black Diamond Wealth Platform

Initial Login Steps

We are excited to introduce you to the Black Diamond Wealth Platform.

To the right is an example of your client portal home page, and below we have detailed the steps you will need to take to gain access to the platform.



1

New User Setup Email

You will receive a “New User Setup” email like the example to the right.

This email will come “from” our firm and a “no reply” email address of noreply@bdreporting.com. Included in this email is a link to set up your Black Diamond Wealth Platform account.

Please click on the “Set Up Account” button or copy and paste the full url into your browser.

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

Should the link expire, please email: blackdiamond@trustcompanyofthesouth.com and we will be happy to resend the email with a new setup link.



Dear New Client User,

Welcome to the Black Diamond Wealth Platform! Trust Company of the South has created a new username (newclientuser@trustcompanyofthesouth.com) for you to view your account activity including performance.

Please click on the below link to set up your account:

[Set Up Account](#)

Or, paste this link into your browser:

<https://bd3.bdreporting.com/Auth/TCTS/SignUp/laX-9Nc1EMfemjo0YvYSoKr2CM0A7IEA>

(This is a temporary link and will expire in 7 days.)

Kind Regards,
Trust Company of the South

2

Security Questions

Upon clicking the link within the email (or copying and pasting it into your browser), you will be prompted to set three security questions. It is required you choose a security question from the pre-existing lists and set up all three questions.

To continue, click “Next.”

The screenshot shows the 'Set Security Questions' page for Trust Company of the South. At the top is the company logo and name. Below the title, there is a instruction: 'Please pick 3 security questions and their answers for use if you forget your password.' The form contains three identical sections. Each section has a dropdown menu for 'Security Question1', 'Security Question2', and 'Security Question3'. Below each dropdown is an 'Answer' field with a toggle icon (an eye with a slash) to show or hide the text. At the bottom right of the form is a blue 'Next' button.



Set Password

Please pick a secure password and confirm it.

Password



|



Empty

Confirm Password



Back

Next

3

Secure Password

Next you will need to set a secure password. Please enter a password of your choosing in the first form field that is at least 8 characters long, includes at least 1 upper case letter and includes at least one number. Then re-type your password in the second form field under “Confirm Password.” If your password meets security requirements described above and matches between the two form fields, you may then click “Next.”

4

Terms of Use

Then, you will need to read through and accept the “Application Terms of Use.” After accepting, you will be directed to your personalized Black Diamond client portal!

You must agree to these terms and conditions to use the website. Please scroll to the bottom of the terms of use in order to accept or decline.

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 BDRREPORTING.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 all applicable laws in the jurisdictions in which you use the Application, including, but not limited to, applicable restrictions concerning privacy, copyright and other intellectual property rights. As used herein the term Application also means interactive tools, quotes, products and services, research reports, and data concerning financial markets, securities and other subjects, some of which is supplied by companies that are not affiliated with any Black Diamond entity (“Third Party Content”). You acknowledge that information, materials, products, software and/or Third Party Content made available on the Application are subject to change at any time and without notice. You also acknowledge that Black Diamond may from time-to-time add or remove beta or other features within the Application without notice, and the use of or access to any added feature shall be governed by these Terms, provided that the use of any beta feature is at your own risk, if and for so long as available. All beta features are provided on an “AS IS” basis, and Black Diamond makes no warranties and disclaims all liability, direct or indirect, with respect to any and all such beta features.

5

Password Update

You will also receive a second email informing you that your password has been updated.

This email will come “from” our firm and a “no reply” email address of noreply@bdreporting.com.



Dear New Client User,

This is a courtesy notification that your Trust Company of the South Black Diamond Wealth Platform password has been updated for username:

newclientuser@trustcompanyofthesouth.com. If you did not make any recent changes to your account, please contact your system administrator.

Kind Regards,

Trust Company of the South

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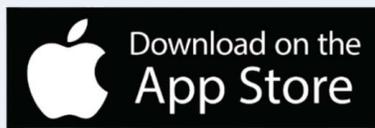
Black Diamond Mobile App Download

Lastly, if you prefer to access Black Diamond via a mobile device, the Black Diamond App is available for download from both the Apple App Store and Google Play.

You can download the mobile app via either of the below links or by navigating to your app store and typing “Black Diamond Wealth Platform” and select the Finance app with the Black Diamond Wealth Platform logo.



Black Diamond



Once the process is complete, we encourage you to bookmark this URL for easy access to the portal: <https://login.bdreporting.com/Auth/SignIn>

If you have any questions with this new user setup process, please email us at blackdiamond@trustcompanyofthesouth.com.