

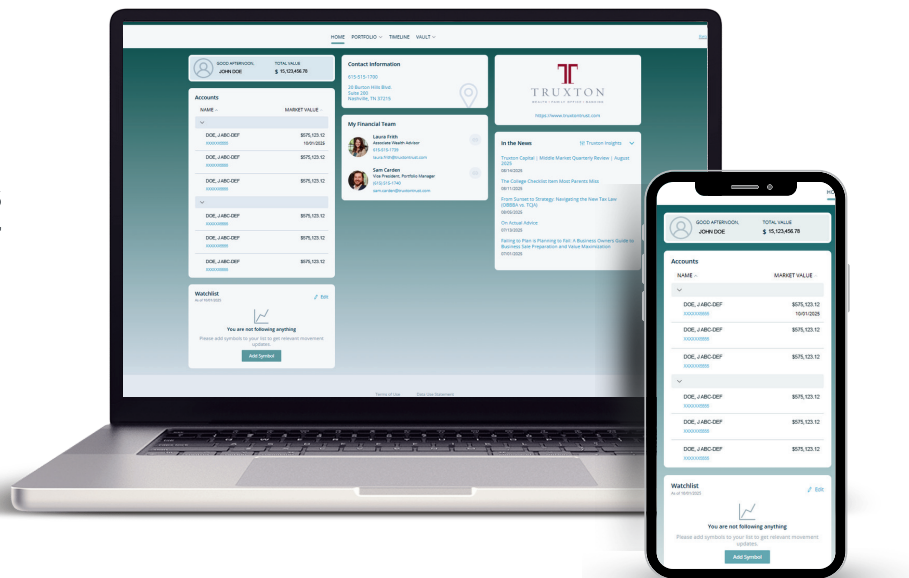
TRUXTON WEALTH BLACK DIAMOND WEALTH PORTAL

Initial Login Quick Guide

We are pleased to introduce the Black Diamond Wealth Platform.

To the right is a preview of your client portal homepage. The steps below will guide you through your initial login and provide secure access to your account.

Your Truxton team is always available if you need assistance.



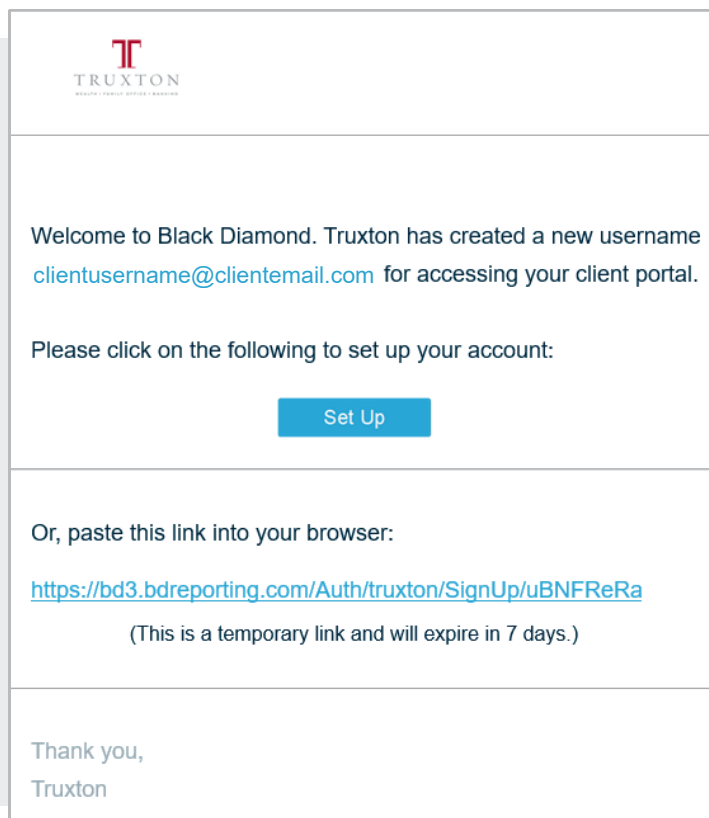
1 New User Setup Email

You will receive a "New User Setup" email similar to the example shown here.

This message will be sent from Truxton Wealth, with a "no reply" address of noreply@bdreporting.com.

Within the email, select the "Set Up" button to begin, or copy and paste the full link into your browser.

For security purposes, the setup link will expire after seven calendar days. If your link expires, please contact your Truxton Wealth Advisor, who will be happy to assist with sending a new setup link. **DO NOT BOOKMARK THIS LINK** as it will expire.



Our team is here to support you every step of the way. If you have any questions at any point during the onboarding process, please don't hesitate to reach out. We will be happy to assist you and provide any guidance you need.



wealthmanagment@truxtontrust.com



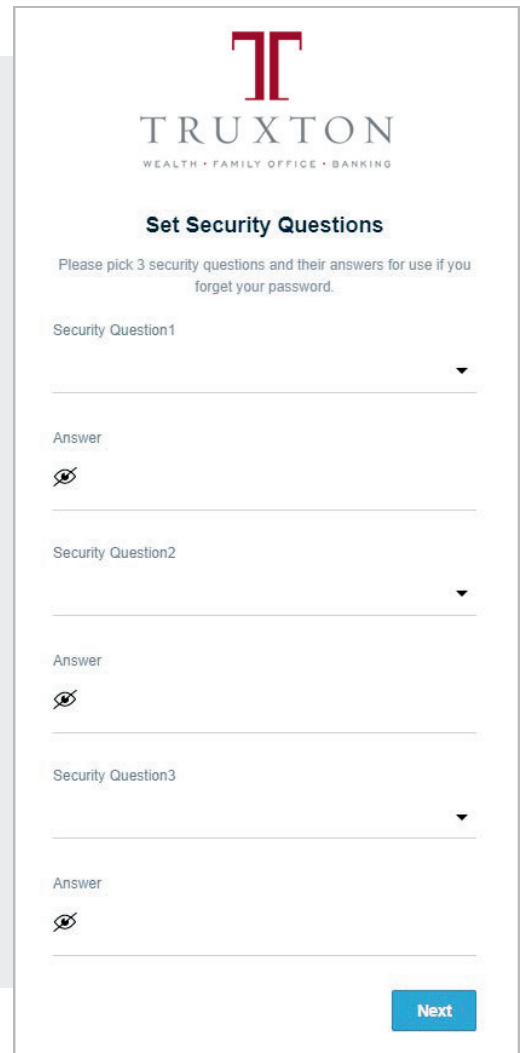
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2 Security Questions

After selecting the link in your email (or pasting it into your browser), you will be prompted to set up three security questions.

Please choose each question from the provided lists and enter your responses. All three questions are required to proceed.

Once complete, click "Next" to continue.



Set Password

Please pick a secure password and confirm it.

Password

|

Empty

Confirm Password

|

Back

Next

3 Secure Password

Next, you will be prompted to create a password for your account.

Your password must be at least 8 characters long and include at least one uppercase letter and one number. Enter your password in the first field, then re-enter it in the "Confirm Password" field.

Once your password meets these requirements and both entries match, click "Next" to continue.

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4 Review Terms of Use

You will be asked to review the "Application Terms of Use."

After reading, select to accept the terms. You will then be directed to your personalized Black Diamond client portal.

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 BDPREPORTING.COM WEBSITE.

5 Download the Mobile App (Optional)

If you prefer to access your account on a mobile device, the Truxton Wealth Black Diamond app is available on both the Apple App Store and Google Play.

You may download the app using the links below, or by searching "Truxton Wealth" in your app store and selecting the app shown here for reference.



If you have any questions during the setup process, please contact your Truxton Wealth Advisor for assistance.



Download on the
App Store



GET IT ON
Google Play



- Your **username** is your **email address**.
- For quick and convenient access, consider bookmarking the login page:
<https://login.bdreporting.com/Auth/truxton/SignIn>

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