



GREAT DIAMOND  
PARTNERS

## Your Monthly Compass

SEPTEMBER 2019



### THANK YOU!

Our team recently celebrated 100 days as an independent wealth management firm and we owe a great part of our success to our valued clients and their families. Your loyalty means everything to us. This venture was driven by a desire to be a true fiduciary, putting our clients' needs first, and we will continue to make that our focus every

day. We appreciate your patience with us during the transition and we are so excited to continue sharing our expanded resources, sophisticated technology and increased objectivity.

### ACCESSING YOUR ACCOUNTS ONLINE



Access your personalized client portal through our **website**. Powered by the Black Diamond Wealth Platform, you can:

- view all household accounts under one login, including 529 plans and annuities
- access a dynamic view of your entire portfolio and account performance
- store and share important documents
- communicate with us
- and more!

Find a user guide **here**.

If you haven't already established your personalized Great Diamond Partners client portal or Schwab Alliance account, please ask us to send you an invitation.



Access your individual Schwab accounts **here**. While the Great Diamond Partners client portal will become your 'go-to' for account information, Schwab

Alliance allows you to:

- establish Bill Pay
- choose paperless communication
- DocuSign some account forms
- deposit checks with mobile app
- update your phone number or address

Learn more at the **Client Learning Center**.

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