

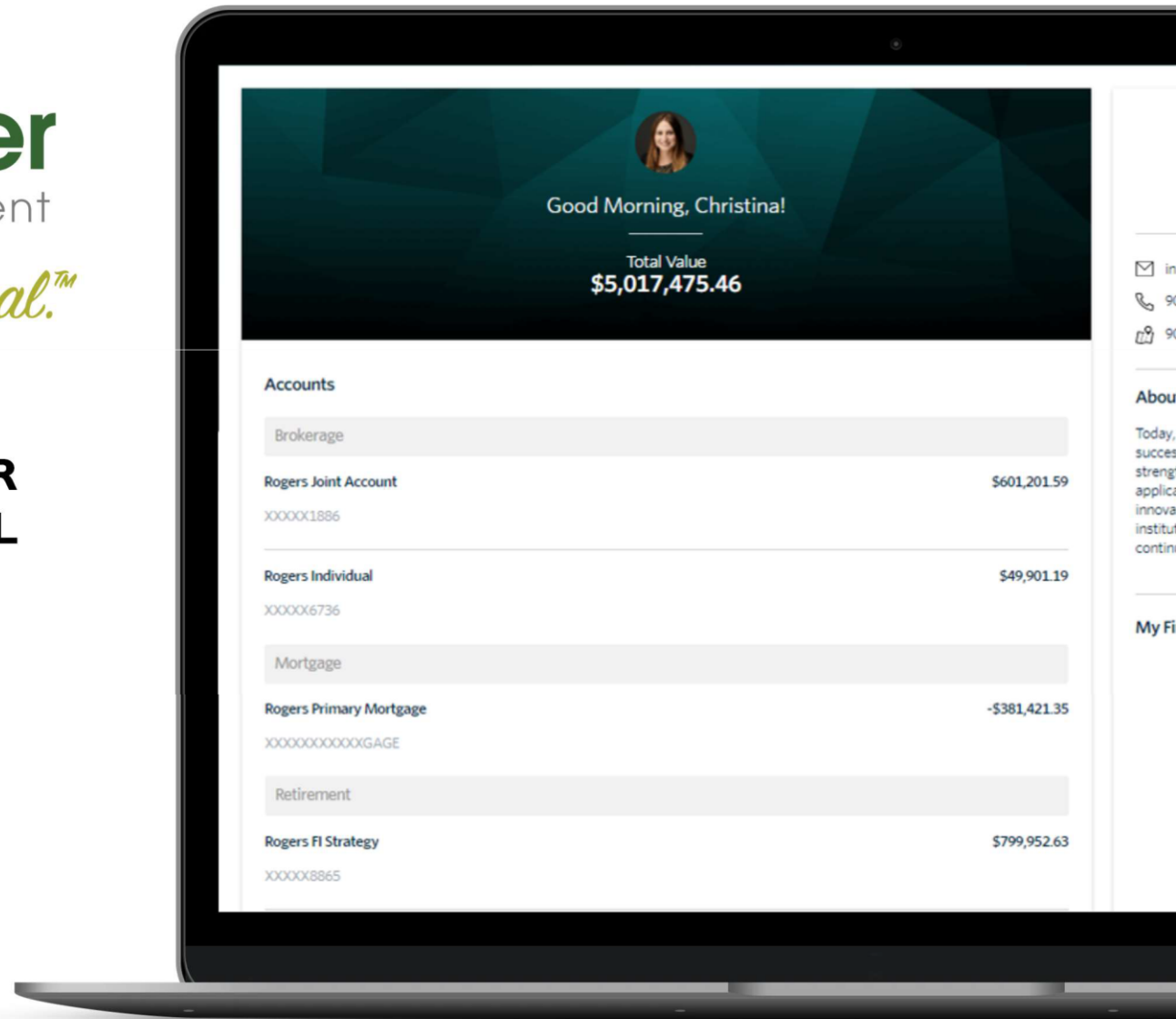
# Beese • Fulmer

Private Wealth Management

*Stay rational.™*

Quick Start Guide

**GAIN ACCESS TO YOUR  
PERSONAL FINANCIAL  
PORTAL TODAY**



# 1.

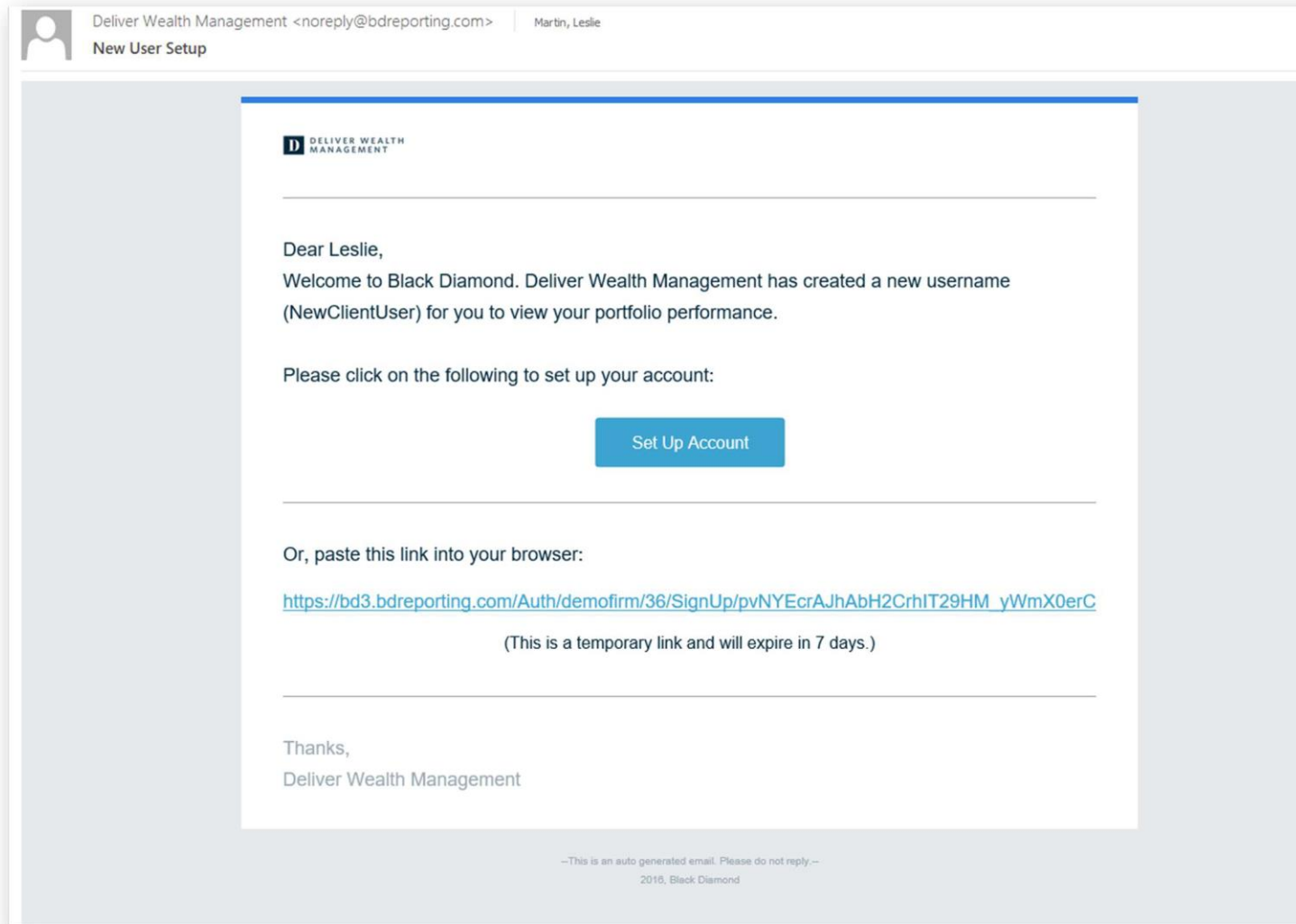
You will receive a “New User Setup” email similar to the example shown here.

This email will come “from” our firm and a “no reply” email address of [noreply@bdreporting.com](mailto:noreply@bdreporting.com).

Included in 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 me know and I will be happy to resend the email with a new set up link.

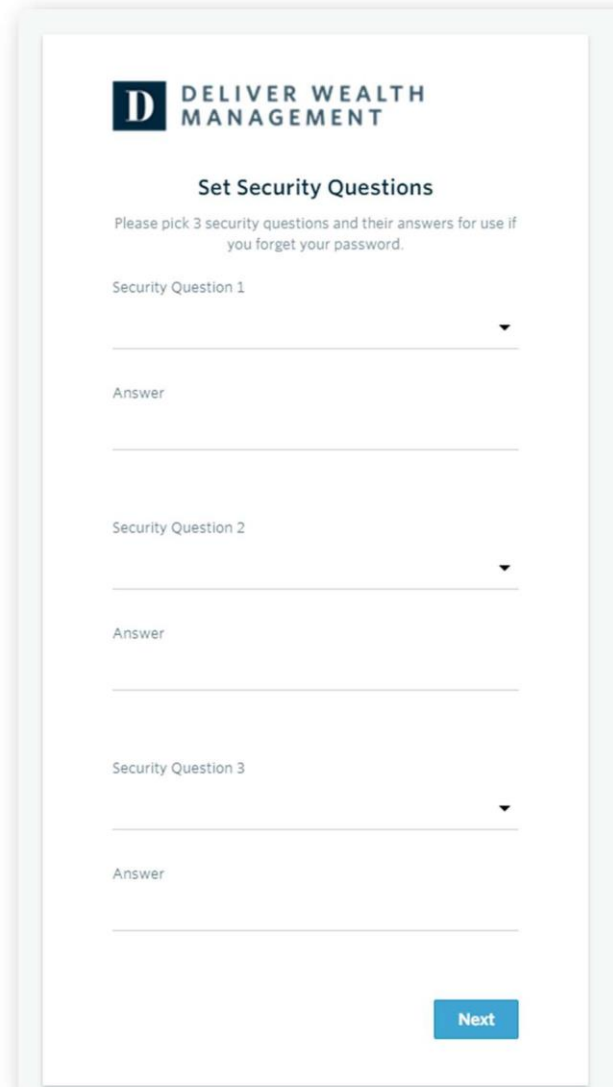


## 2.

Upon clicking the link within the email (or copying and pasting it 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.

To continue, click “Next.”



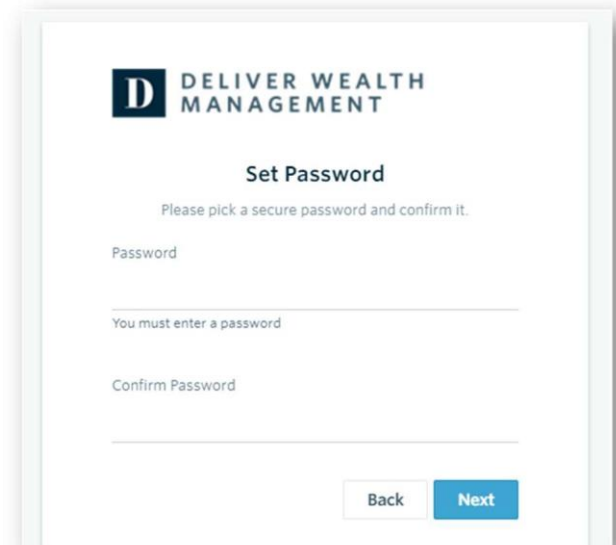
The screenshot shows the 'Set Security Questions' form for Deliver Wealth Management. At the top left is the logo, a dark blue square with a white letter 'D', followed by the text 'DELIVER WEALTH MANAGEMENT'. Below the logo is the title 'Set Security Questions' and a sub-instruction: 'Please pick 3 security questions and their answers for use if you forget your password.' The form contains three identical sections. Each section starts with a label 'Security Question 1', 'Security Question 2', or 'Security Question 3' followed by a dropdown menu icon. Below each dropdown is a text input field labeled 'Answer'. At the bottom right of the form is a blue button with the text '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 and matches between the two form fields, you may then click “Next.”



The screenshot shows the 'Set Password' form for Deliver Wealth Management. At the top left is the logo, a dark blue square with a white letter 'D', followed by the text 'DELIVER WEALTH MANAGEMENT'. Below the logo is the title 'Set Password' and a sub-instruction: 'Please pick a secure password and confirm it.' The form contains two text input fields. The first is labeled 'Password' and has a placeholder text 'You must enter a password'. The second is labeled 'Confirm Password'. At the bottom right of the form are two buttons: a white button with the text 'Back' and a blue button with the text '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” our firm and a “no reply” email address of [noreply@bdreporting.com](mailto:noreply@bdreporting.com).

### Application Terms of Use

**Leslie, 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](http://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](http://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

Deliver Wealth Management <noreply@bdreporting.com> | Martin, Leslie

### Account Update Confirmation



Dear Leslie,

This is a courtesy notification that your Deliver Wealth Management password has been updated for username: **NewClientUser**. If you did not make any recent changes to your account, please contact your system administrator.

Thanks,  
Deliver Wealth Management

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If you have any questions, please contact us.  
We are always here for you.