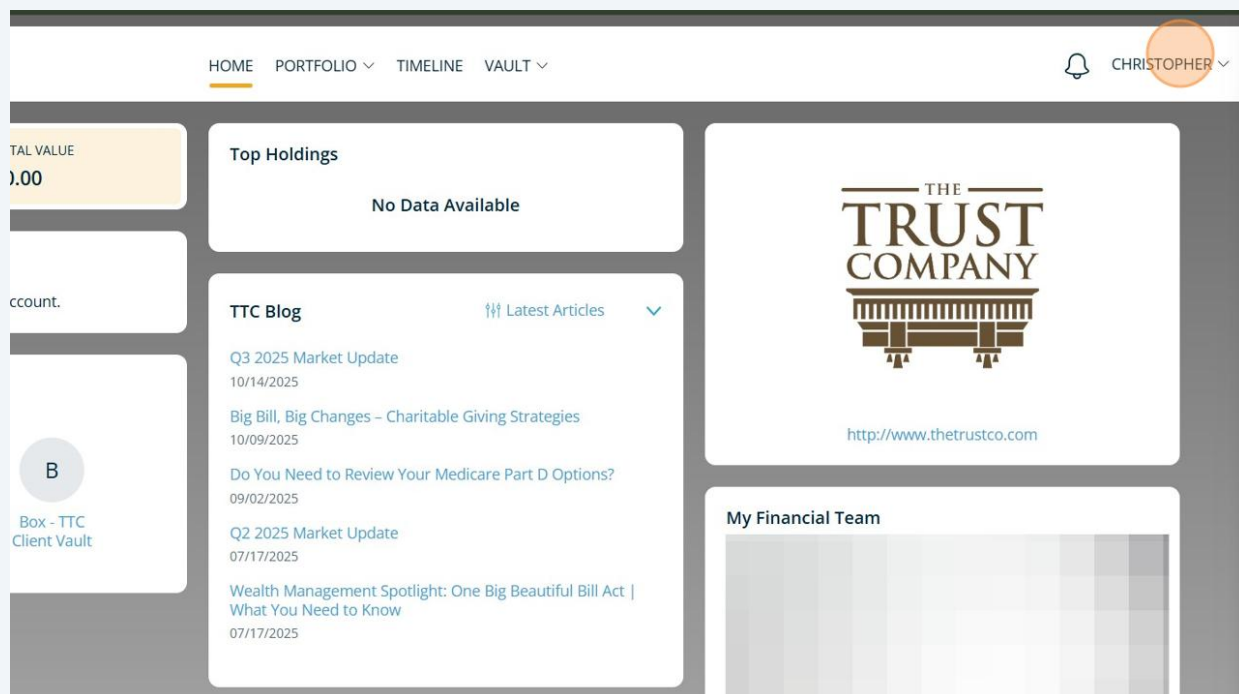


Setup of SMS Text Verification in Black Diamond



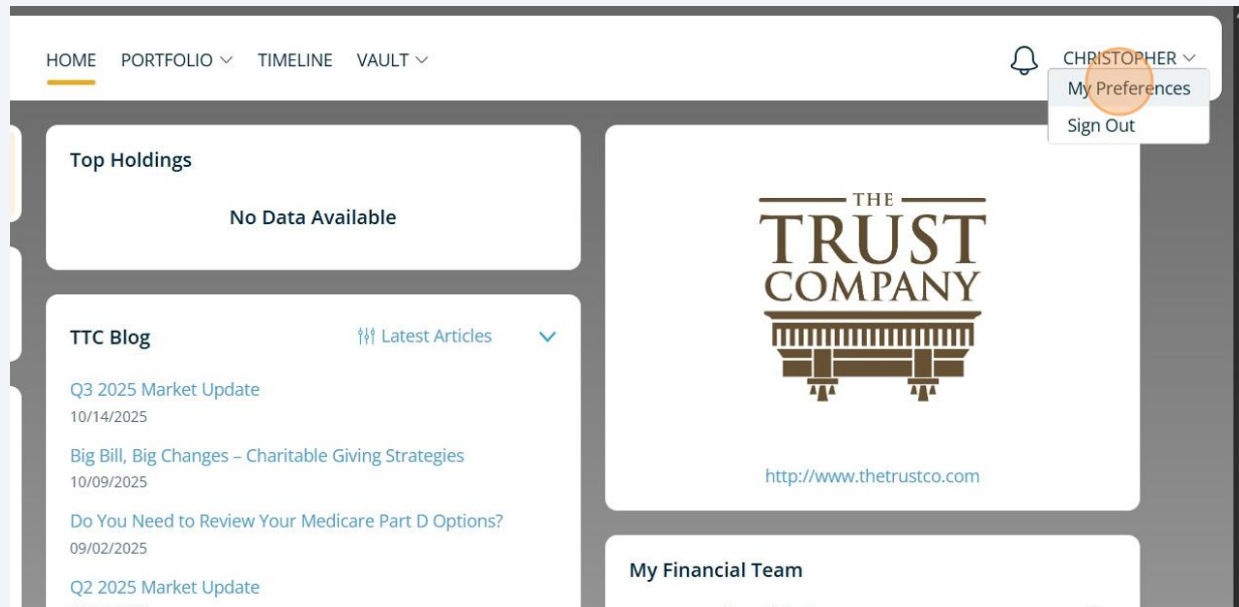
If receiving an Email code is not your preferred method of verification you can elect to receive a text message instead to login to Black Diamond. You will still be able to use email codes as well if you would like afterwards.

- 1 Once logged into your Portal you will click on your name in the upper right corner

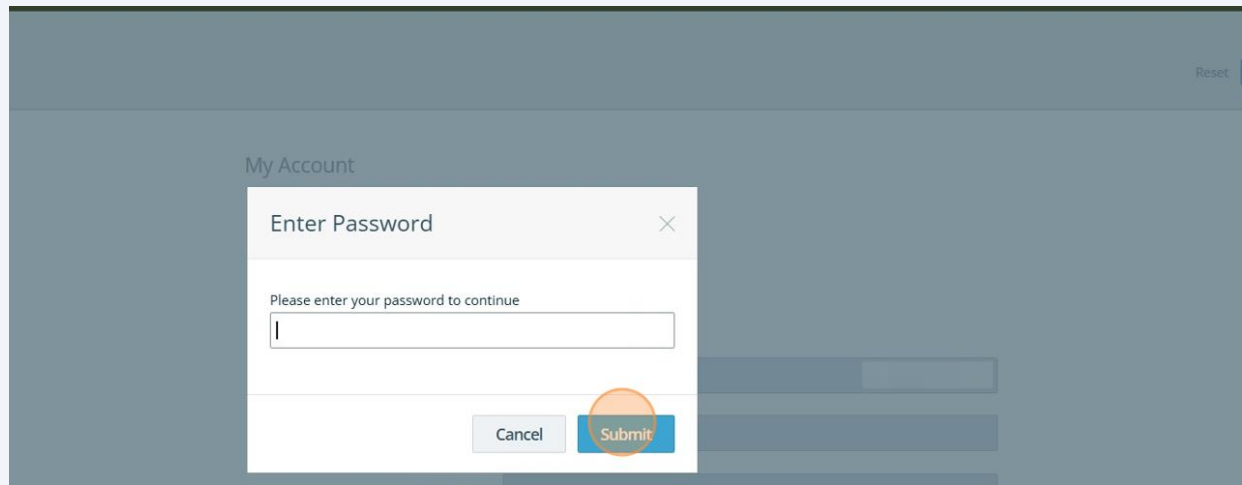


2

Click "My Preferences"

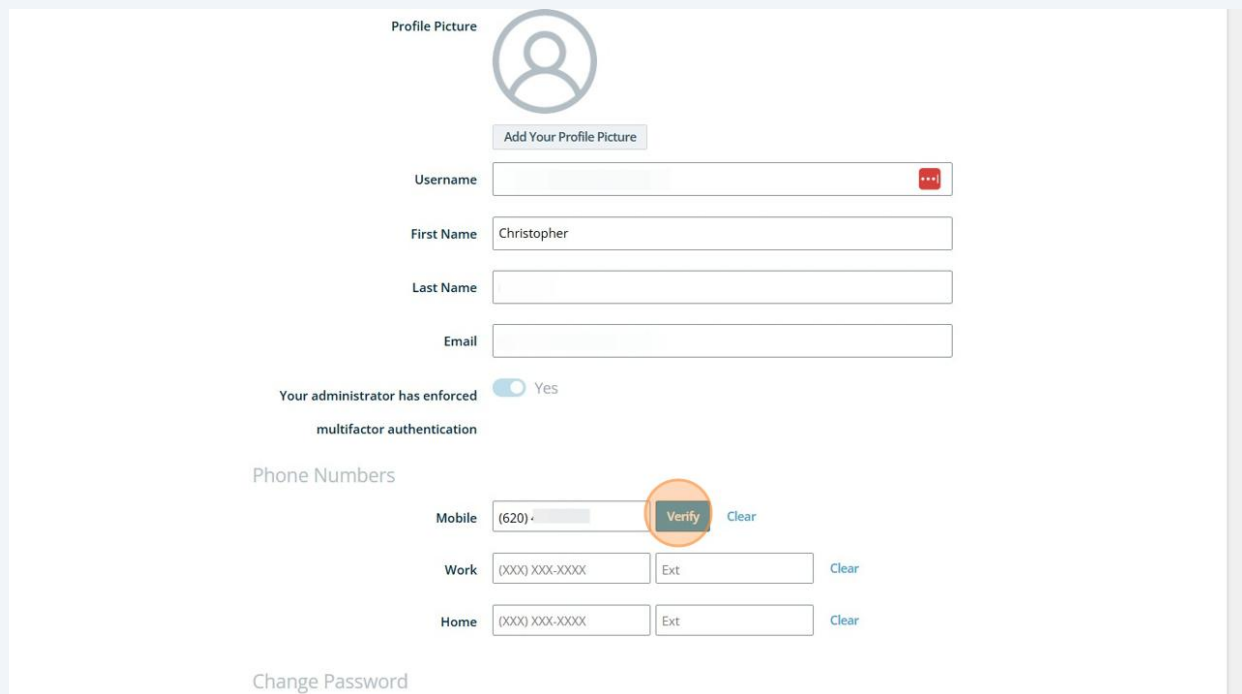


- 4 Enter your password to confirm you are able to make this change. Click "Submit"



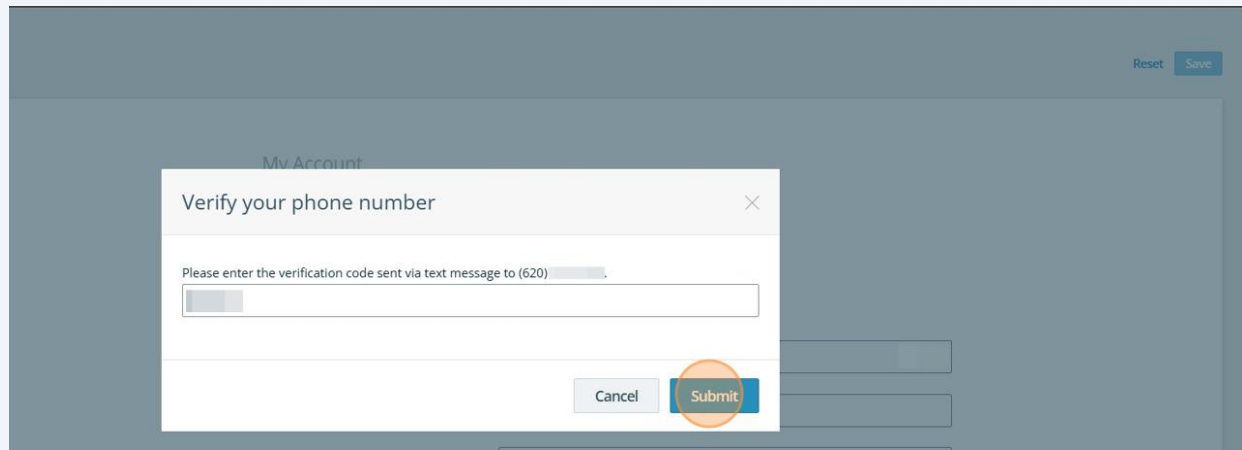
The screenshot shows a 'My Account' page with a modal dialog titled 'Enter Password'. The dialog has a close button (X) in the top right corner. Inside the dialog, there is a text input field with the placeholder text 'Please enter your password to continue'. Below the input field are two buttons: 'Cancel' and 'Submit'. The 'Submit' button is highlighted with an orange circle. In the top right corner of the background page, there is a 'Reset' link.

- 5 The last step is you will need to verify your phone number. To do this click "Verify" and you will receive a text message.



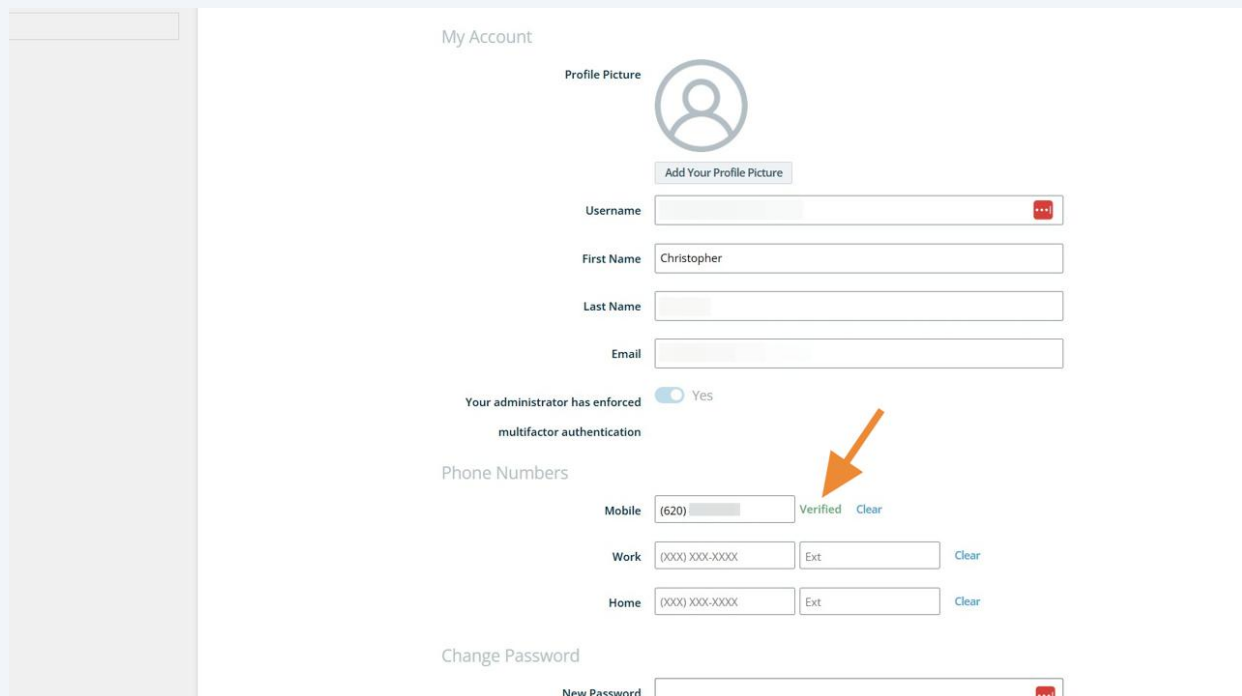
The screenshot shows a user profile page. At the top, there is a 'Profile Picture' section with a placeholder icon and an 'Add Your Profile Picture' button. Below this are input fields for 'Username', 'First Name' (containing 'Christopher'), 'Last Name', and 'Email'. A toggle switch for 'Your administrator has enforced multifactor authentication' is set to 'Yes'. The 'Phone Numbers' section contains three rows: 'Mobile' with a field containing '(620) -' and a 'Verify' button (highlighted with an orange circle), 'Work' with a field containing '(XXX) XXX-XXXX' and a 'Clear' button, and 'Home' with a field containing '(XXX) XXX-XXXX' and a 'Clear' button. At the bottom, there is a 'Change Password' link.

- 6 Enter the number in the popup box. Now click "Submit"



A screenshot of a web application interface. In the center, a modal dialog box titled "Verify your phone number" is displayed. The dialog has a close button (X) in the top right corner. Inside the dialog, there is a text input field with a placeholder that says "Please enter the verification code sent via text message to (620) [redacted]". Below the input field, there are two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a red circle. In the background, a "My Account" page is visible, showing a "Reset" and "Save" button in the top right corner.

- 7 You should now see "Verified" next to your Mobile number.



A screenshot of the "My Account" page. The page has a sidebar on the left. The main content area is titled "My Account" and contains several sections: "Profile Picture" with a placeholder icon and an "Add Your Profile Picture" button; "Username" with a text input field and a red eye icon; "First Name" with a text input field containing "Christopher"; "Last Name" with a text input field; "Email" with a text input field; "Your administrator has enforced multifactor authentication" with a toggle switch set to "Yes"; "Phone Numbers" with three rows: "Mobile" (with a text input field containing "(620) [redacted]" and a "Verified" status next to it, highlighted by a red arrow), "Work" (with a text input field containing "(XXX) XXX-XXXX" and an "Ext" field), and "Home" (with a text input field containing "(XXX) XXX-XXXX" and an "Ext" field); and "Change Password" with a "New Password" text input field and a red eye icon. Each text input field has a "Clear" button next to it.

8

On your next login attempt you will see the below screen after you have entered your username and password. You can choose which method to receive your code now.



Verify your Identity

Please select from one of the following delivery methods to verify your identity.

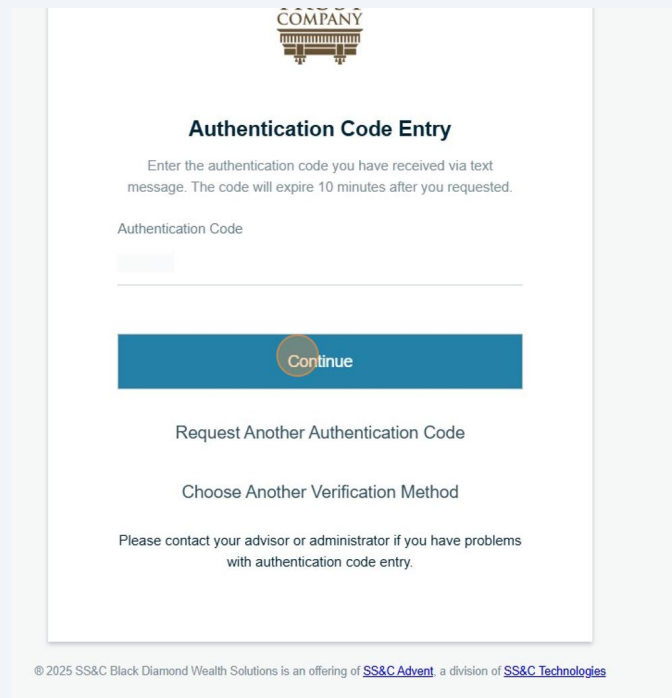
Text Message

Email

Cancel

9

Enter the code you received and click "Continue" to complete your login to your portal.



The screenshot shows a web page for "Authentication Code Entry". At the top is a logo with the word "COMPANY" above a stylized building icon. The title "Authentication Code Entry" is centered. Below it, a message states: "Enter the authentication code you have received via text message. The code will expire 10 minutes after you requested." A label "Authentication Code" is followed by a text input field. A large blue button with a gold circle and the word "Continue" is centered. Below the button are two links: "Request Another Authentication Code" and "Choose Another Verification Method". At the bottom, a note says: "Please contact your advisor or administrator if you have problems with authentication code entry." The footer contains the copyright notice: "© 2025 SS&C Black Diamond Wealth Solutions is an offering of [SS&C Advent](#), a division of [SS&C Technologies](#)".

COMPANY

Authentication Code Entry

Enter the authentication code you have received via text message. The code will expire 10 minutes after you requested.

Authentication Code

[Continue](#)

[Request Another Authentication Code](#)

[Choose Another Verification Method](#)

Please contact your advisor or administrator if you have problems with authentication code entry.

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