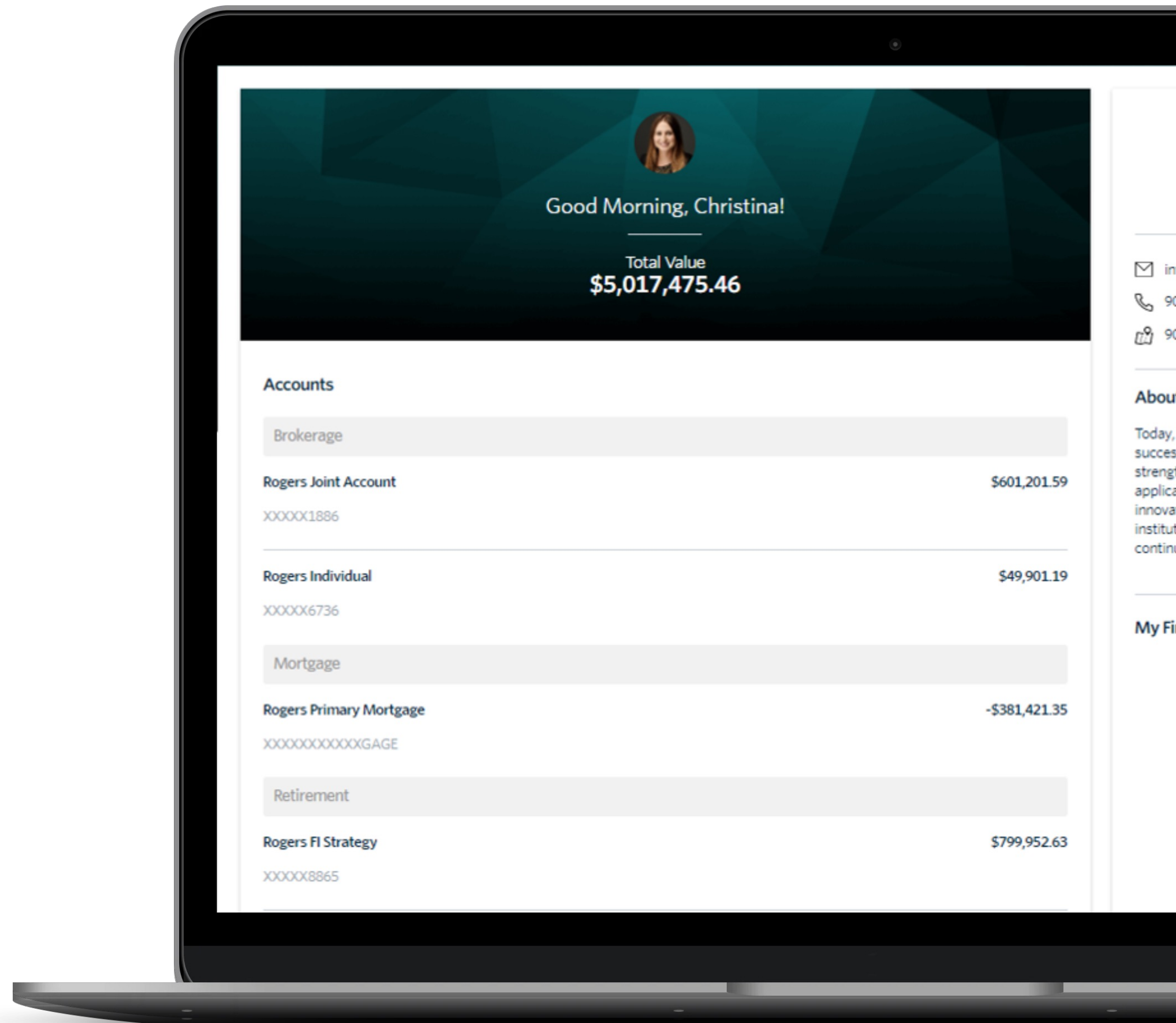




## Quick Start Guide

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



# 1.

You will receive a “**New User Setup**” email like 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.



Dear Mike,

Welcome to Black Diamond. Allen, Mooney & Barnes Investment Advisors, LLC has created a new username (mike.mcmahon@amb) for you to view your portfolio performance.

You can use our [Quick Start Guide](#) to help set up your new account.

Please click on the following to set up your account:

Set Up Account

Or, paste this link into your browser:

<https://bd3.bdreporting.com/Auth/demofirm/36/SignUp/pvNYEcrAJhAbH2CrhIT29HM>

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

Thanks,

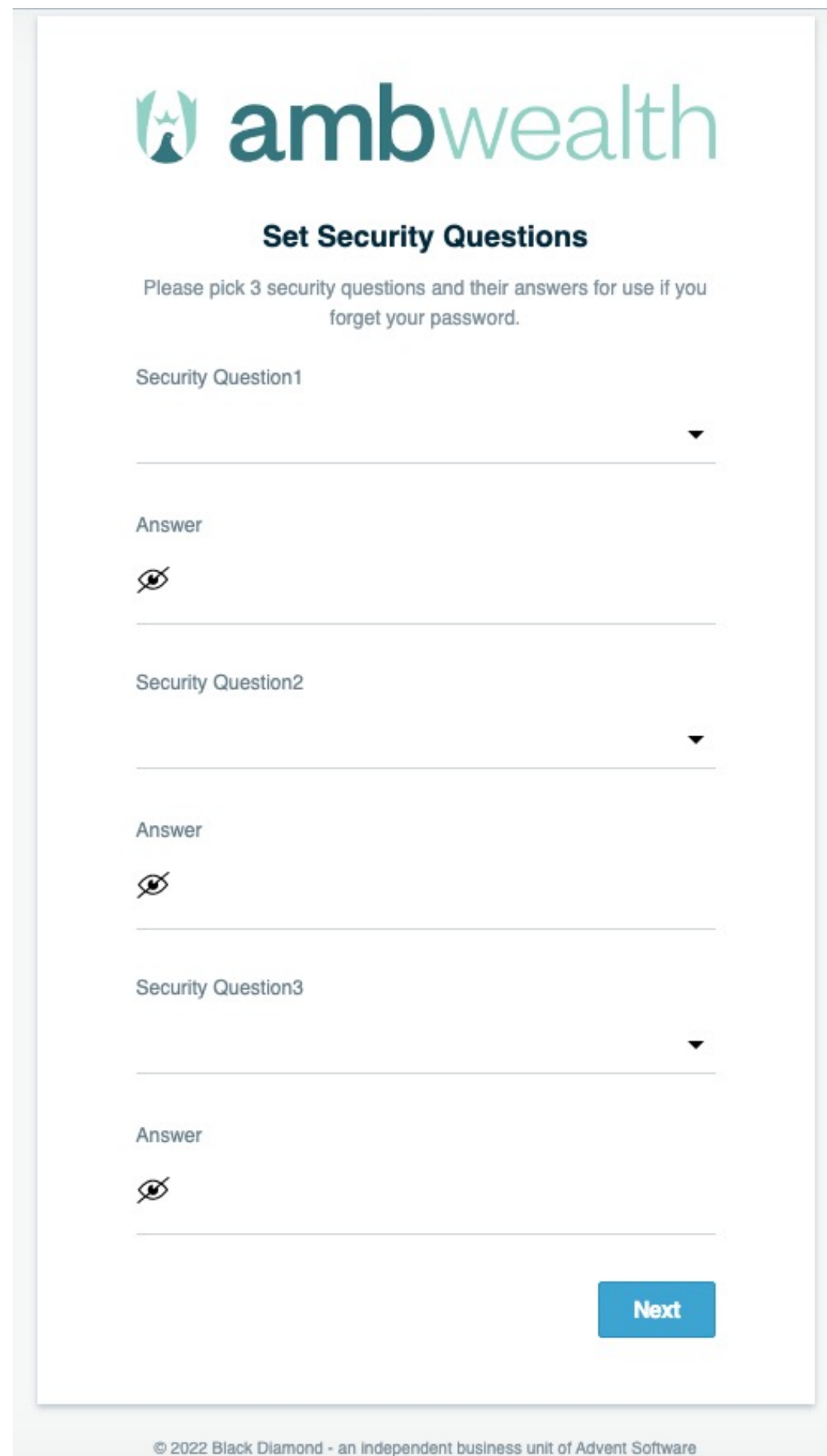
Allen, Mooney & Barnes Investment Advisors, LLC

# 2.

After clicking the link in the email (or copying and pasting it into your browser), you will be prompted to set **Security Questions**.

Please choose three (3) security questions from the preexisting lists.

To continue, click “**Next.**”



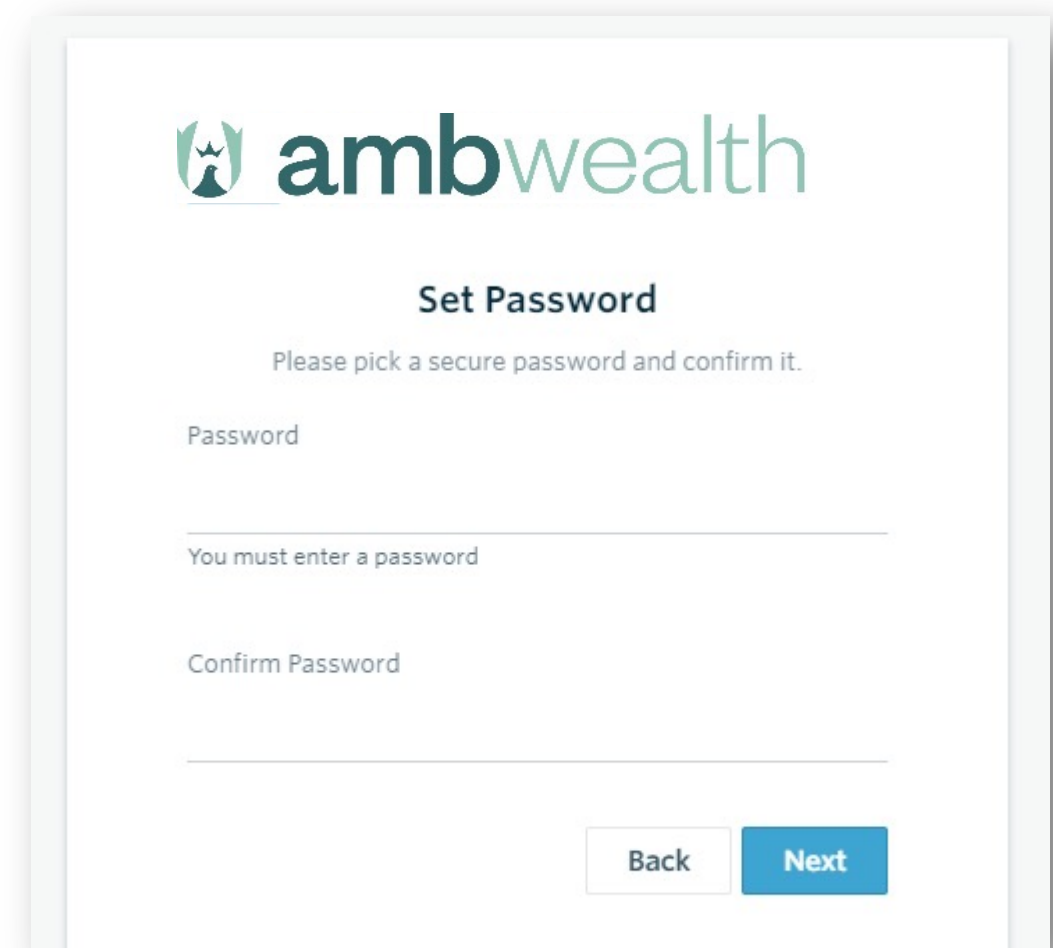
The screenshot shows the 'Set Security Questions' page for ambwealth. At the top is the ambwealth logo. Below it is the title 'Set Security Questions' and a subtitle 'Please pick 3 security questions and their answers for use if you forget your password.' The page contains three identical sections for setting security questions. 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 answer. At the bottom right of the form is a blue 'Next' button. At the very bottom of the page is a copyright notice: '© 2022 Black Diamond - an independent business unit of Advent Software'.

# 3.

Next, you will need to set a secure password. **Passwords must be 11 or more characters long, consisting of Numbers, Upper and Lowercase Letters and Special Characters.**

Re-type your password in the second form field under “**Confirm Password.**”

If your password meets security requirements, you may then click “**Next.**”



The screenshot shows the 'Set Password' page for ambwealth. At the top is the ambwealth logo. Below it is the title 'Set Password' and a subtitle 'Please pick a secure password and confirm it.' The page has two input fields: 'Password' and 'Confirm Password'. The 'Password' field has a validation message 'You must enter a password' below it. At the bottom right are two buttons: a white 'Back' button and a blue 'Next' button.

# 4.

The final step is to read through and accept the “**Application Terms of Use.**”

After accepting, you will automatically be 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 BDREPORTING.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



Dear Michael,

This is a courtesy notification that your Allen, Mooney & Barnes Investment Advisors, LLC password has been updated for username: @gmail.com. If you did not make any recent changes to your account, please contact your system administrator.

Thanks,

Allen, Mooney & Barnes Investment Advisors, LLC

--This is an auto-generated email. Please do not reply.--



# 5.

## Multi – Factor Authentication (MFA)

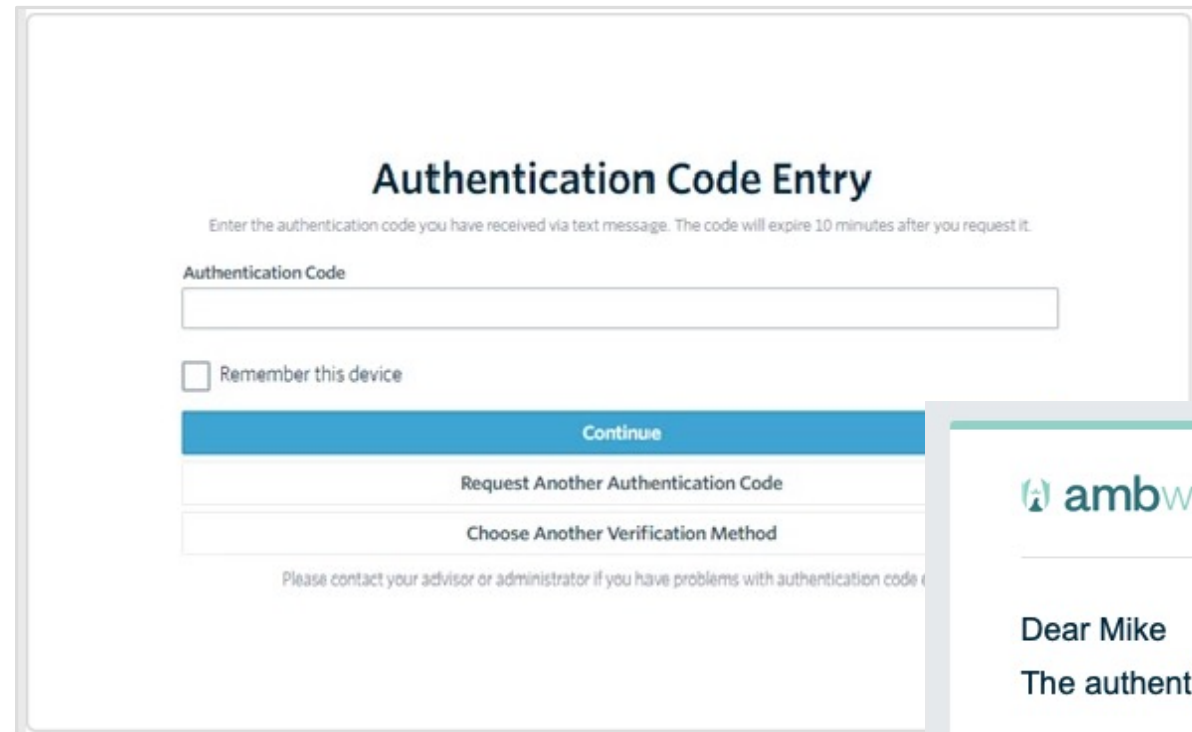
MFA is required to “Verify your Identity” after your first (new) Login

After entering your Username & Password, you’ll be asked to “Verify your identity” via email, text message, or by answering Security Questions.

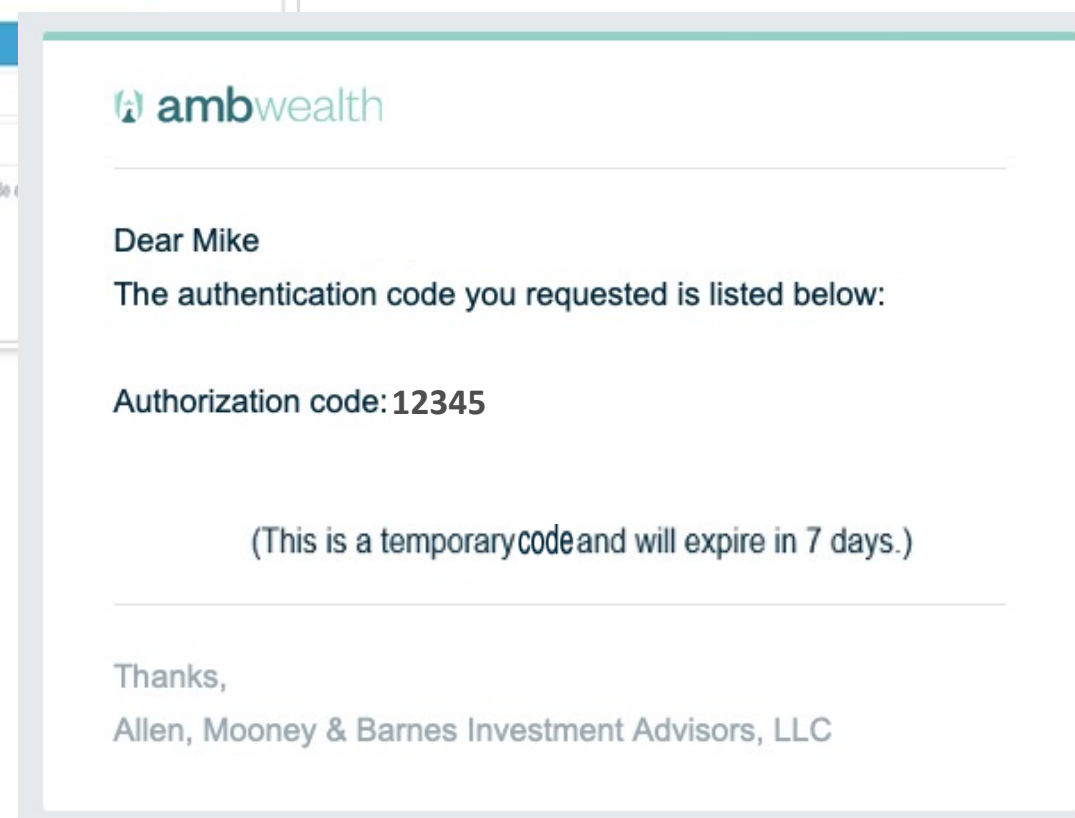
After you first **Verify your Identity**, you may not need to do it on subsequent Logins while using the same device.

Additionally, you can turn on **Facial Recognition** on an iPhone, if you’d like to Login using that functionality.

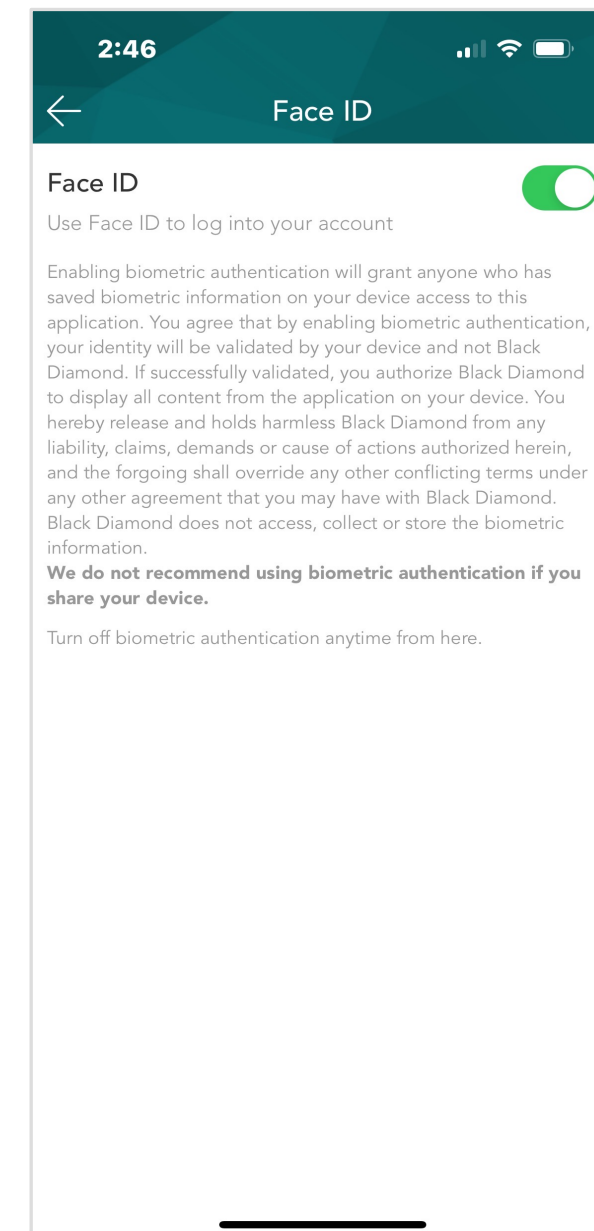
After initial Login using Verify your Identity, go to Settings and select **Face ID**, then click button to turn on.



The image shows a web-based 'Authentication Code Entry' form. At the top, it says 'Authentication Code Entry' in bold. Below that, a smaller line of text reads: 'Enter the authentication code you have received via text message. The code will expire 10 minutes after you request it.' There is a text input field labeled 'Authentication Code'. Below the input field is a checkbox labeled 'Remember this device'. At the bottom, there are three buttons: 'Continue' (highlighted in blue), 'Request Another Authentication Code', and 'Choose Another Verification Method'. A small footer note says: 'Please contact your advisor or administrator if you have problems with authentication code'.



The image shows an email verification message from 'ambwealth'. The email is addressed to 'Dear Mike'. The main body of the email states: 'The authentication code you requested is listed below:'. Below this, it says 'Authorization code: 12345'. A note in parentheses says: '(This is a temporary code and will expire in 7 days.)'. At the bottom, it says 'Thanks, Allen, Mooney & Barnes Investment Advisors, LLC'.



The image shows an iPhone screen displaying the 'Face ID' settings. At the top, the status bar shows the time '2:46' and signal/battery icons. The title bar is green and says 'Face ID'. Below the title bar, there is a toggle switch for 'Face ID' which is turned on (green). Below the toggle, it says 'Use Face ID to log into your account'. A large block of text explains that enabling biometric authentication grants access to the application and that the user agrees to validate their identity by their device. It also states that Black Diamond does not access, collect, or store biometric information. At the bottom, it says 'Turn off biometric authentication anytime from here.'

# 6.

## Mobile Application

Download the *ambwealth Client App* from the Apple App Store or Google Play Store

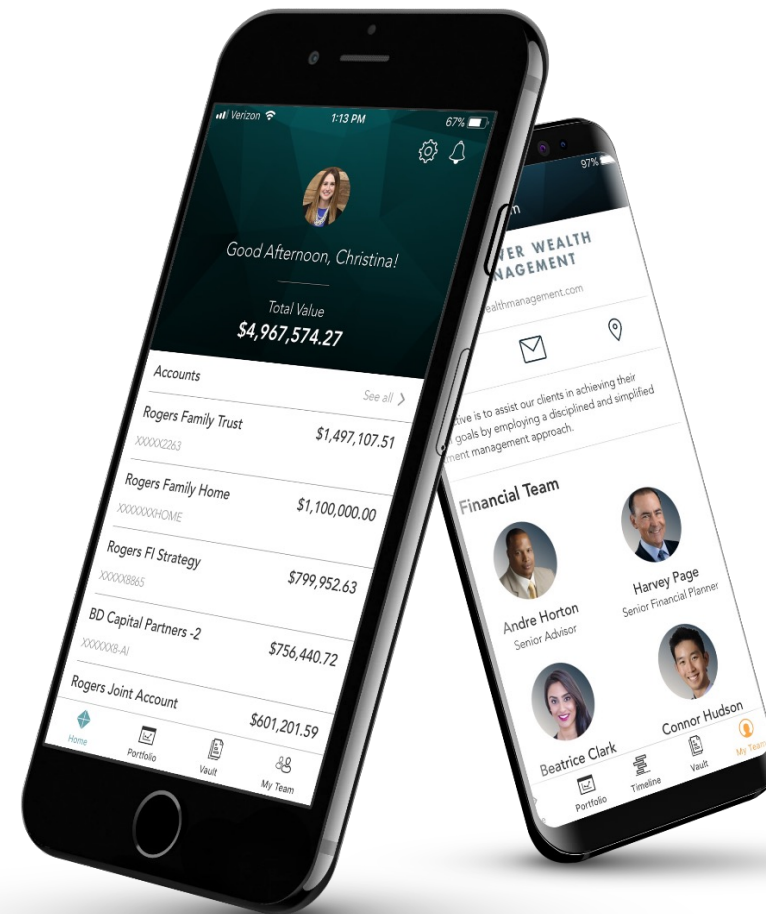
Click on the Apple/Android symbol or it's link to download the *ambwealth Client App* for your device:



<https://apps.apple.com/us/app/ambwealth-client-app/id1635582012>



<https://play.google.com/store/apps/details?id=com.bdmobile.f3154c>



### App Store Preview

This app is available only on the App Store for iPhone and iPad.

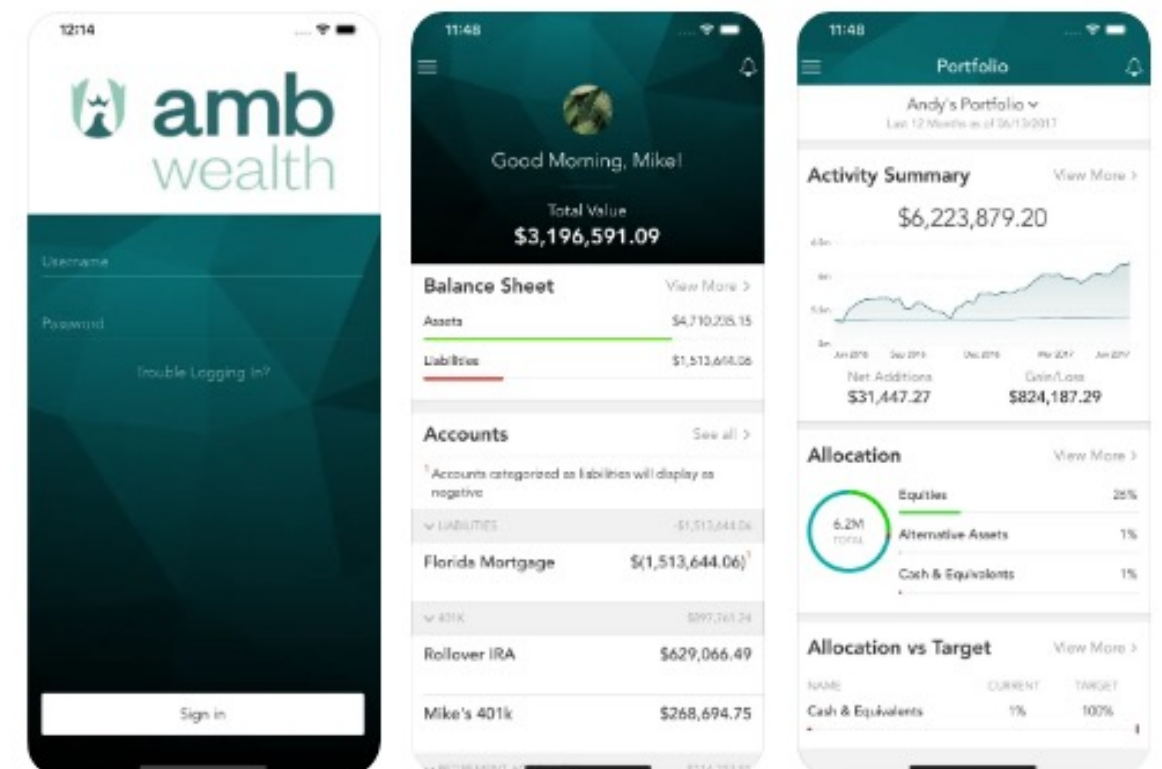


**ambwealth Client App** 4+

Allen, Mooney & Barnes Brokerage Services, LLC

Free

### Screenshots iPhone iPad





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

[info@AMBWealth.com](mailto:info@AMBWealth.com)  
866-277-1500