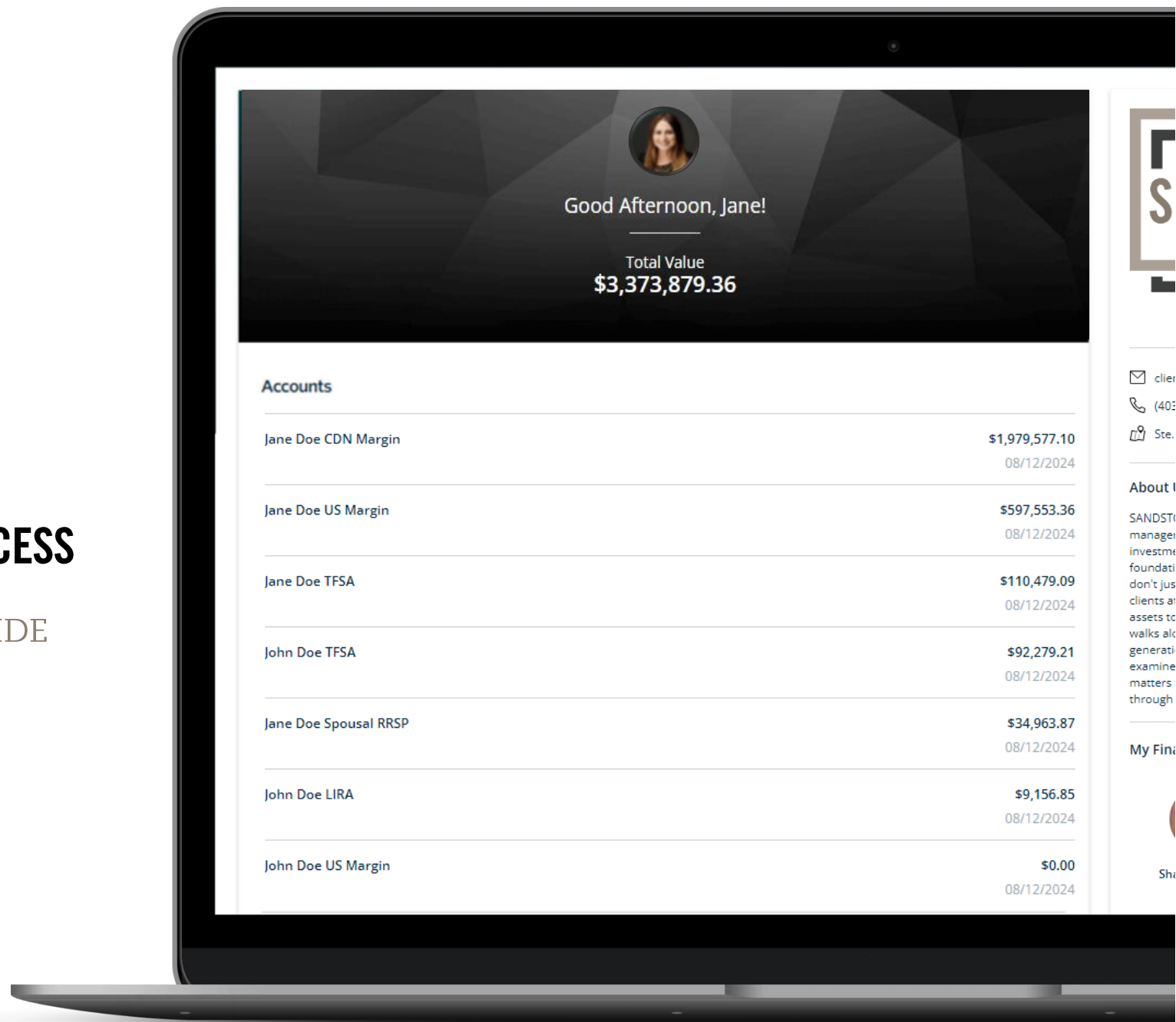




CLIENT PORTAL ACCESS

QUICK START GUIDE



1.

You will receive an email “from” our firm with the address noreply@bdreporting.com.

Please click on the button or copy and paste the url into your browser to set up your account.

For security purposes, your link will expire after 7 days.

Should the link expire, let us know and we will happily resend a new email.



Dear Jane,

Welcome to your SANDSTONE portal setup. Your profile has been created with the username ([jdoe@sandstoneam](mailto:jdoe@sandstoneam.com)) for you to view your portfolio.

If you have any questions or feedback, please do not hesitate to contact us at clientservice@sandstoneam.com.

Please click on the following to create your password:

Set Up Account

Or, paste this link into your browser:

https://bd3.bdreporting.com/Auth/demofirm/36/SignUp/pvNYEcrAJhAbH2CrhIT29HM_yWmX0erC

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

Sincerely,

SANDSTONE Asset Management

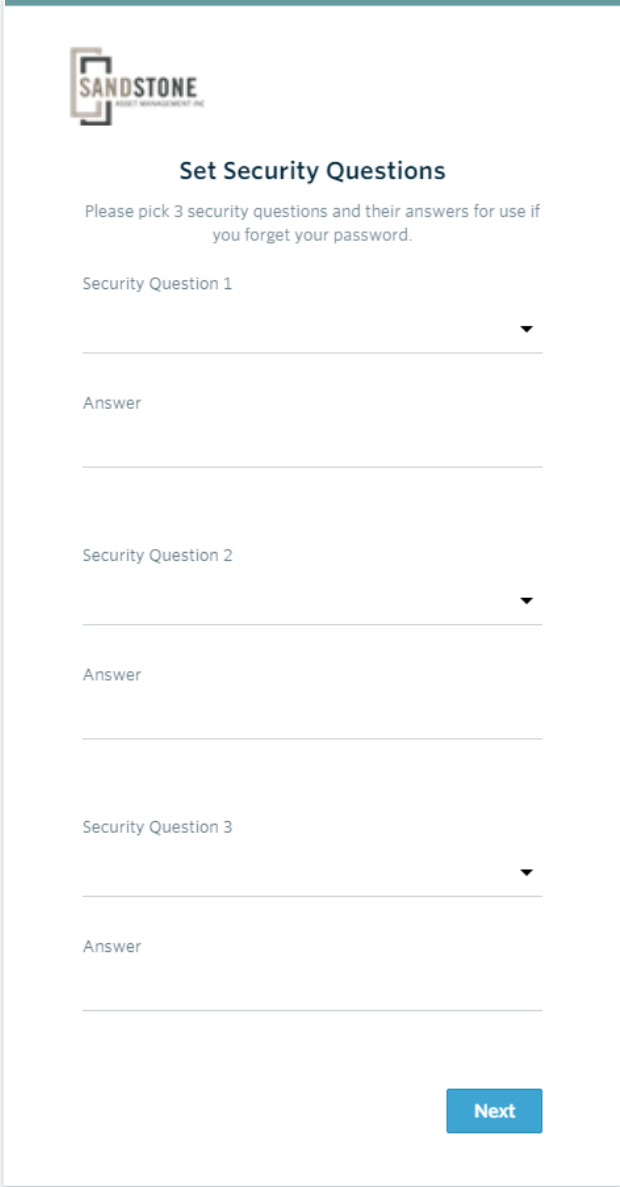


Please note that usernames cannot be updated by clients. If you have a new email address and would like to update your username to match, then please let us know and we can make that change for you.

2.

Next, you will be prompted to create security questions.

Select three security questions from the pre-existing lists and set up their corresponding answers.



SANDSTONE
ASSET MANAGEMENT INC.

Set Security Questions

Please pick 3 security questions and their answers for use if you forget your password.

Security Question 1

Answer

Security Question 2

Answer

Security Question 3

Answer

Next

3.

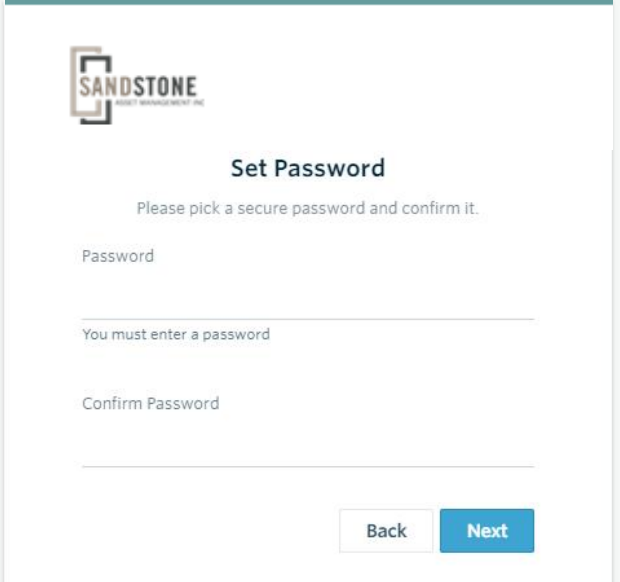
The password needs at least:

- 8 characters
- 1 upper case letter
- 1 number

Now it's time to create a secure password.

Enter your chosen password and confirm it in the second field.

If your password meets security requirements and the two form fields match, you may click "Next."



SANDSTONE
ASSET MANAGEMENT INC.

Set Password

Please pick a secure password and confirm it.

Password

You must enter a password

Confirm Password

Back **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.

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 (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 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 Jane,

This is a courtesy notification that your SANDSTONE portal password has been updated for username: jdoe@sandstoneam.com.

If you did not make any recent changes to your account, please contact us at clientservice@sandstoneam.com or (403) 218-6125.

Sincerely,
SANDSTONE Asset Management


5.

Login Problems

Please follow these directions if you need help signing in to the site.



Username 

Password 


[Sign In](#)

[Trouble Logging In?](#)

Select "Trouble logging in?" on the sign-in page

You will receive an email with a link to access the site.

Follow the steps provided

Error! Invalid username and password combination. 

Error! Your user account has been locked. Please click "Trouble logging in?" to unlock your account. 

What's the problem?

[I forgot my password.](#)

[I forgot my username.](#)

[I need to unlock my account.](#)



Dear Jane,

We received a request to reset the password for your SANDSTONE portal.

To reset your password, please click on the following:

[Reset Password](#)



If you have any questions, please contact us.

We are always here for you.

(403) 218-6125

clientservice@sandstoneam.com

www.sandstoneam.com/client-portal-faq