





















 Trash

+

ZIP

File Name

### Widget View

## Black Diamond Window



## Notes

Public ☒

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Add note





Shared

Private

File-name

File name  
Uploaded on Month 00

File name  
Uploaded on Month 00

File name  
Uploaded on Month 00

Upload Content



File View



Marcus (You)



Oprah (Client)

Notes


Public

☒

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consectetur adipiscing elit, sed do  
eiusmod tempor incididunt ut  
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Add note





Shared


Private

 **File name**  
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Uploaded on Month 00

Upload Content

File-name

File View

Marcus (You)

Oprah (Client)

Notes

Public

☒

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Add note



Meeting Details

Meeting Title:

Employment Income Review

Description:

Lorem ipsum dolor sit amet, asda

Date & Time

27 April 2021 | 07:00 PM - 08:00 PM

Participants:

Meeting Activity

5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting

5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting

5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting

5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting

5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting

Meeting Agenda

Income v/s Variable

Years of Retirement

Discuss potential investment objectives for the the for a single asset over...

View More

Contingency

Discuss potential investment objectives for the the for a single asset over...

View More

Discuss potential investment objectives for the the for a single asset over...

View More

A video feed showing a man with a beard and short brown hair, wearing a light blue button-down shirt, smiling at the camera. He is in an office setting with a computer monitor and other office equipment visible in the background.

Marcus (You)

A video feed showing a woman with long brown hair, wearing a white cardigan over a patterned top, smiling at the camera. She is in a home setting with a white sofa and a bookshelf in the background.

Oprah (Client)

Notes

Public

Lorem ipsum dolor sit amet, asda consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et...

Lorem ipsum dolor sit amet, asda consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et...

Add note

A small, light gray icon of a paper plane, used for sending the note.

Oprah Smith - Portfolio Review

Revoke access

A small white icon of a speech bubble with a tail, located in the bottom right corner of the dark footer bar.

Meeting Details

Meeting Title:Employment Income Review

Description:Lorem ipsum dolor sit amet, asda

Date & Time27 April 2021 | 07:00 PM - 08:00 PM

DescriptionPotential Investment Objectives

Meeting Activity

- 5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting
- 5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting
- 5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting
- 5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting
- 5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting

Meeting Agenda

- Income v/s Variable
- Years of Retirement
- Discuss potential investment objectives for the the for a single asset over...

View More
- Contingency
- Discuss potential investment objectives for the the for a single asset over...

View More
- Discuss potential investment objectives for the for a single asset over a short period of time, these problems are not severe, and the additive process is often an excellent approximation

View Less



Marcus (You)



Oprah (Client)

NotesPublic

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Lorem ipsum dolor sit amet, asda consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et...

Add note

Meeting Details

Meeting Title:Employment Income Review

Date & Time:27 April 2021 | 07:00 PM - 08:00 PM

Participants:Marc Brooks, Oprah Smith

DescriptionLorem ipsum dolor sit amet, asda consectetur adipiscing elit, sed do ....

Meeting Activity

- 5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting
- 5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting
- 5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting
- 5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting
- 5:09 PM • 27 Nov, 2020

Marc Brooks joined the meeting
- 5:09 PM • 27 Nov. 2020

Meeting Agenda

- Income v/s Variable

Years of Retirement

Discuss potential investment objectives for the the for a single asset over...View More
- Contingency

Discuss potential investment objectives for the the for a single asset over...View More

Discuss potential investment objectives for the the for a single asset over...View More

Discuss potential investment objectives for the the for a single asset over...View More
- Savings

Discuss potential investment objectives for the the for a single asset over...View More

Discuss potential investment objectives for the the for a single asset over...View More
- Retirement

Discuss potential investment objectives for the the for a single asset over...View More

Discuss potential investment objectives for the the for a single asset over...View More



Marcus (You)



Oprah (Client)

Notes

Public

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Lorem ipsum dolor sit amet, asda consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et...

Add note

Agenda

- 1

Agenda Title

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- 2

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Agenda Title

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Add Agenda Item +



Content View



Your screen is being shared

[Hide](#)



Marcus (You)



Oprah (Client)

Notes

Public



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Add note



Revoke access





## Notes

Public ☒

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Add note



Salesforce Window



Notes

Public ☒

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Add note

## Integration Name

Open in a window

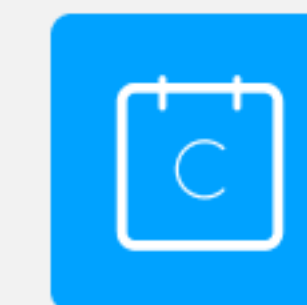


All

 Favorites

 Recent

## Black Diamond



Add Integration +

### Widget View

### Integration Name

Open in a window



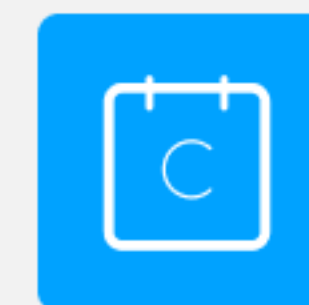
All

 Favorites

 Recent

Calendly

Add Integration +



### Widget View

### Integration Name

Open in a window

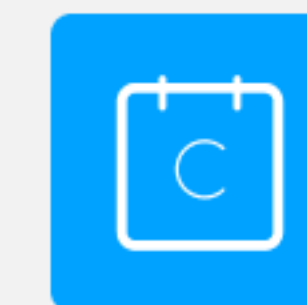


All

## Favorites

 Recent

Finicity



Add Integration +

### Widget View

## Integration Name

Open in a window

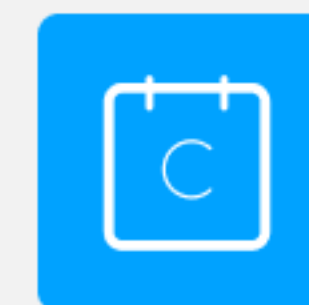


All

 Favorites

 Recent

MoneyGuidePro



Add Integration +

### Widget View

## Integration Name

Open in a window

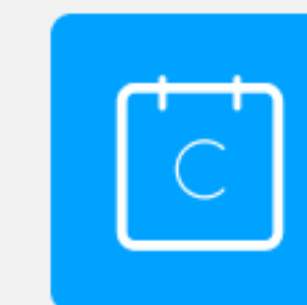


All

## Favorites

 Recent

Salesforce



Add Integration +

### Widget View

## Integrations

 Search



## Categories



All



## Favorites



## Recent

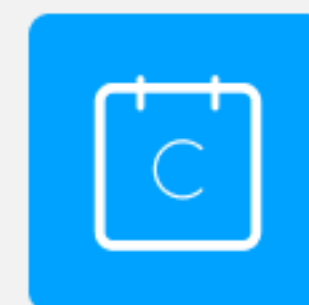
Add Integration +

## Integration Name

### Type of Integration

Open in a window

Yahoo Mail



### Widget View

## 00 Integrations

## 00 Integrations

 Search



All

All



## Favorites



## Recent

Add Integration +

+

Salesforce



**MoneyGuidePro**



## Black Diamond



## Finicity



## Calendly



# Yahoo Mail



Agenda

1

Agenda Title

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Agenda Title

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5

Enter the title

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Add Agenda Item +

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Drag and drop content  
or

Upload



Marcus (You)



Oprah (Client)

Notes Public ☒

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Add note



Agenda

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Add Agenda Item +



Drag and drop content  
or

Upload



Marcus (You)



Oprah (Client)

Notes Public ☒

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Add note



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Add Agenda Item +



Drag and drop content  
or

Upload



Marcus (You)



Oprah (Client)

Notes Public ☒

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Add note



Agenda

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Add Agenda Item +



File View



Marcus (You)



Oprah (Client)

Notes

Public

☒

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labore et...

Add note



# Welcome to VCC

Virtual Collaboration Tool for Financial Advisors and their Clients

Learn More

Try for Free



## How it works



### Schedule

Schedule a virtual meeting with your client.



### Plan

Create a meeting agenda, upload documents and other materials for discussion.



### Collaborate

Collaborate, share ideas, model changes and identify next steps.

## Digital Interactive Experience

Meet the client demand for virtual service using our Digital Interactive Experience which combines virtual meetings with advanced collaboration tools.

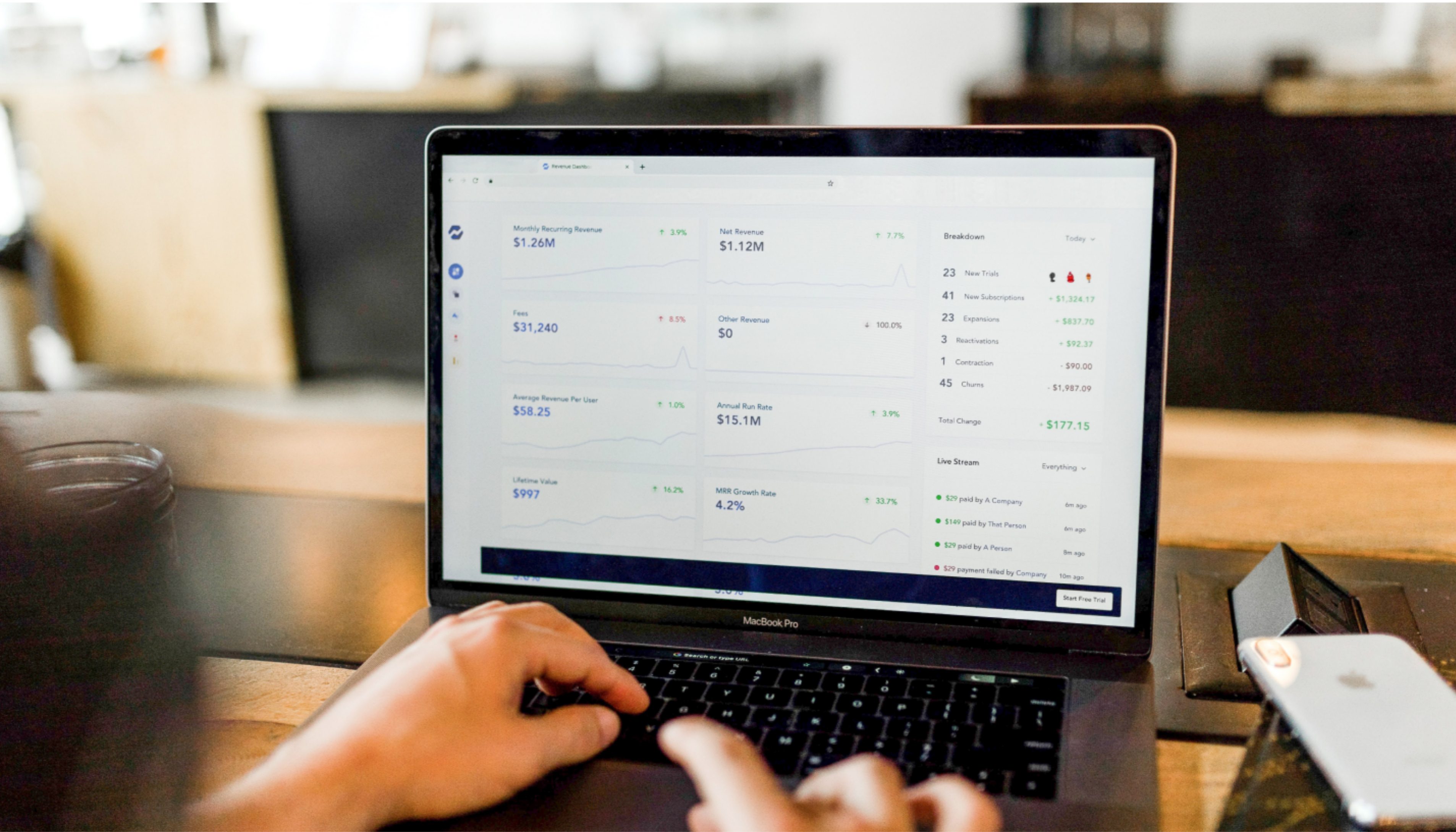


## Virtual Document Management

Review and present agreements, disclosures and other documents. Also obtain any required client signatures in a single virtual session.

## Integration

Enjoy the productivity advantage of integration with your CRM, calendar, service data and other desktop apps like performance reporting, proposals, presentations.



## Do a lot more with VCC



### Task Management

VCC allows you to track, manage and archive tasks



### Workflow Automation

VCC allows you to track, manage and archive tasks



### Note Taking

VCC allows you to take Public and Private notes during the meeting

## Plans and Pricing

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor inc et dolore magna aliqua.

BASIC

Personal Meeting

Free

Sign up for free

- Host up to 100 participants
- Group meetings up to 40 mins
- Unlimited one-on-one Meetings

BUSINESS

Small & Med Businesses

\$100 /year/license

Buy Now

- Host up to 300 participants
- Group meetings up to 1000 mins
- Single Sign-On
- Recording Transcripts
- Managed Domains
- Company Branding

ENTERPRISE

Large Enterprise-Ready

\$200 /year/license

Contact Sales

- Host up to 5000 participants
- Unlimited Cloud Storage
- Dedicated Customer Success
- Recording Transcripts
- Managed Domains
- All features included in Business

# Create New Password

Type and confirm a secure new password for the account.

---

New Password

Confirm New Password

---

Back

Confirm

# Forgot Password?

Verify your email or phone to set a new password

---

Email/Phone

Enter your email or phone

---

Back

Verify and Continue

# Password Sucessfully Changed!

You can now login to your account using your  
new password.

---

[Go to Login](#)

# Select Company

Please select the company you wanna enter into.

Company Name  
@subdomain  
Role

Company Name  
@subdomain  
Role

Company Name  
@subdomain  
Role

Company Name  
@subdomain  
Role

Company Name  
@subdomain  
Role

Company Name  
@subdomain  
Role

Company Name  
@subdomain  
Role

Company Name  
@subdomain  
Role

# Verify Account

A verification code has been sent to your phone. This code will be valid for 15 minutes

---

Verification Code

Didn't receive a code? [Resend](#)

---

Back

Verify and Continue

# Verify Account

A verification code has been sent to your phone. This code will be valid for 15 minutes

---

Verification Code

Didn't receive a code? [Resend](#)

---

Back

Verify and Continue

# Login to your account

Don't have an account? [Signup](#)

---

Company (Optional)

Email/Phone

Password

[Forgot Password?](#)

---

Login





Add New Client +

### Widget View



## Schedule Meeting

Add New Client +



[Open in a window](#)



### Widget View

 Search

 Search



## Recently Contacted



Next Meeting on Mon 00  
ID: 0000000000



Next Meeting on Mon 00  
ID: 0000000000



Next Meeting on Mon 00  
ID: 0000000000



Next Meeting on Mon 00  
ID: 0000000000



Next Meeting on Mon 00  
ID: 0000000000



Next Meeting on Mon 00  
ID: 0000000000

Add New Client +



Client ID: 000000 / Email: clientname@gmail.com

### Assign Action Item

## Schedule Meeting

Shared Private

Shared Private

[Open in a window](#)

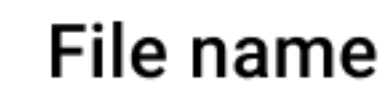


Uploaded on Month 00



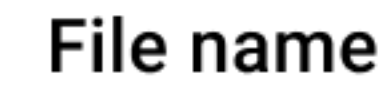
**File name**

Uploaded on Month 00



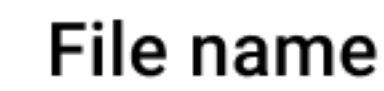
File name

Uploaded on Month 00



File name

Uploaded on Month 00



File name

Uploaded on Month 00



## File name

Uploaded on Month 00

**Upload Content** 



Content View



### Widget View



# The meeting has ended

You will receive the Meeting Summary and related artifacts in your email.

[Return to Dashboard](#)

## Please rate your experience!

Rate the audio and video experience



Poor



Average



Good



Great



Excellent

# The meeting has ended

You will receive the Meeting Summary and related artifacts in your email.

[Return to Dashboard](#)

## Please rate your experience!

Rate the audio and video experience



Poor



Average



Good



Great



Excellent

### Pick the options where we can improve

- ☐ Could not hear other people
- ☐ Other people could not hear me
- ☐ Could not see other people
- ☐ Other people could not see me
- ☐ Audio/Video was lagging

[Submit](#)

# The meeting has ended

You will receive the Meeting Summary and related artifacts in your email.

[Return to Dashboard](#)



**Thank You!**

Your feedback will help us create  
better experience for you in future.



 Search
 

**Request Title**  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Request Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Request Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Request Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Request Title  
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Mon 00, 12:00 to 12:00 AM

CN Request Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

Schedule Meeting +



Salesforce



### Widget View

## Widget View

## Latest

CN

Request Title

Client name and 0 others

Mon 00, 12:00 to 12:00 AM

CN

Request Title

Client name and 0 others

Mon 00, 12:00 to 12:00 AM

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Request Title

Client name and 0 others

Mon 00, 12:00 to 12:00 AM

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Mon 00, 12:00 to 12:00 AM

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Client name and 0 others

Mon 00, 12:00 to 12:00 AM

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Request Title

Client name and 0 others

Mon 00, 12:00 to 12:00 AM

**Schedule Meeting** +

## Black Diamond















Search 

**Meeting Title**  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN **Meeting Title**  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

**Schedule Meeting** +



CN



CN

3 more participants

[View Details](#)

**Start Zoom Meeting**

## Contents

< 3/3 >

$$\vdots$$

Public ☒

## 1 Agenda Title

0 contents

## 1 Agenda Title

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## 1 Agenda Title

## 1 Agenda Title

Content View

Add Agenda Item +

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 labore et...

Add note



1 =  
2 =



### Widget View

## Upcoming

**Meeting Title**  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

Schedule Meeting +

Month 00 / 12:00 AM to 12:00 AM 

CN

CN

CN

3 more participants

[View Details](#)

**Start Zoom Meeting**

## Black Diamond



### Widget View

 Search
 

**Meeting Title**  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM


CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

CN Meeting Title  
Client name and 0 others  
Mon 00, 12:00 to 12:00 AM

Schedule Meeting +

Month 00 / 12:00 AM to 12:00 AM 

CN

CN

CN

3 more participants

[View Details](#)

**Start Zoom Meeting**

MoneyGuidePro







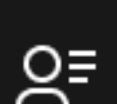


















# Settings


## Personal

 My Profile

## Company


 Company Profile

 Payment & Billing

 Manage Subscription

## Company Profile

Manage your company information



# Company Name

Account ID: 00000000000000

Member since Month 00, Year

Change Logo Picture

## Company Details

[Edit](#)

Company Name

Placeholder text

Tax ID

Placeholder Text

Employees

1-40

Company Description

Description

Company Number

Placeholder text




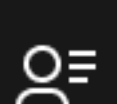



Company Website

Placeholder text

Country


State

Zip Code





# Settings


## Personal

 My Profile

## Company

 Company Profile

 Payment & Billing

 **Manage Subscription**

## Manage Subscription

Manage your subscription

# You are currently on a Business Plan

Annual plan, paid monthly  
Renews automatically on Month 00, Year

Upgrade Plan

## Plan Details

[Edit](#)

### Plan Benefits :

- Host up to 300 participants
- Group meetings up to 1000 mins
- Single Sign-On
- Recording Transcripts
- Managed Domains
- Company Branding

### Additional Options :

Audio Conference





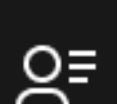



\$10 /year/license

### License :

No of Licences


10

▼





Settings


Personal

 My Profile

Company

 Company Profile

 Payment & Billing

 Manage Subscription

## My Profile

Manage your profile information



### Full Name

Account ID: 000000000000

Member since Month 00, Year

Change Profile Picture

### Account Details

First Name

Placeholder text

Last Name

Placeholder text

Email Address

Placeholder text

Phone Number

Placeholder text

Cancel

Save Changes

 [Manage Subscription](#)

## Change Profile Picture

[Edit](#)

Placeholder text

\_\_\_\_\_





Settings

Personal

 My Profile

Company

 Company Profile

 Payment & Billing

 Manage Subscription

Payment & Billing

Manage your payment & billing information

Payment Details

[Edit](#)

Card Holder Name

Credit/Debit Card Number

Expiration Date

CVV

Billing Details

[Edit](#)

Address Line 1

Address Line 2

Country

State

Zip Code

- 1 Choose a Plan
- 2 Customize Plan
- 3 Create Account
- 4 Verify Account
- 5 Company Details
- 6 Payment

# Choose a Plan

Find the right solution for your needs.

Billed Monthly ☒ Billed Annually (20% off)

<div>BASIC</div> <div>Personal Meeting</div> <div>Free</div> <div>Sign up for free</div> <div><ul style="list-style-type: none"><li>• Host up to 100 participants</li><li>• Group meetings up to 40 mins</li><li>• Unlimited one-on-one Meetings</li></ul></div>	<div>BUSINESS</div> <div>Small &amp; Med Businesses</div> <div>\$100 /year/license</div> <div>Buy Now</div> <div><ul style="list-style-type: none"><li>• Host up to 300 participants</li><li>• Group meetings up to 1000 mins</li><li>• Single Sign-On</li><li>• Recording Transcripts</li><li>• Managed Domains</li><li>• Company Branding</li></ul></div>	<div>ENTERPRISE</div> <div>Large Enterprise-Ready</div> <div>\$200 /year/license</div> <div>Contact Sales</div> <div><ul style="list-style-type: none"><li>• Host up to 5000 participants</li><li>• Unlimited Cloud Storage</li><li>• Dedicated Customer Success</li><li>• Recording Transcripts</li><li>• Managed Domains</li><li>• All features included in Business</li></ul></div>
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- 1 Choose a Plan
- 2 Customize Plan
- 3 Create Account
- 4 Verify Account
- 5 Company Details
- 6 Payment

# Company Details

Add details of your company.



Upload Company Logo

Company Name

Enter your company name

Tax ID

0000000000

Employees

1-500



Company Description

Enter company description

Company Website

Enter your company website URL

Company Number

Enter your company number

Country

Country



State

State



Zip Code

00000000

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Save and Continue

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# Create Account

By creating an account, you will become the Account Owner for this plan.



Upload Profile Picture

First Name

Enter your first name

Last Name

Enter your last name

Email

Enter your email address

Phone Number

Enter your phone number

Password

Enter your password

Confirm Password

Enter your password

By clicking continue below, you agree to the [Privacy Policy](#) and [Terms of Service](#)

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Save and Continue

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# Customize Plan

Create a plan that is tailored to your specific needs.

## 1. No. of Licenses

1-10

▼

## 2. Additional Options

<div>Cloud Recording</div> <div>\$10 /year/license</div>	<div>Audio Conference</div> <div>\$10 /year/license</div>	<div>Large Meetings</div> <div>\$10 /year/license</div>
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# Payment

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

## Card Details

Card Holder Name

Enter full name

Credit/Debit Card Number

0000 0000 0000 0000

Company Name

Enter your company name

Expiration Date

MM/YY

CVV

CVV

## Billing Details

Address Line 1

## Subscription

[Edit](#)

Enterprise

\$100.00

1 host

\$ 100.00/yr/host

annual

Today's Charge

\$100.00

before taxes

Recurring annual charge

\$100.00

Starts next year

before taxes

Charges auto renew

(unless cancelled before next renewal date)



- 1 Choose a Plan
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# Verify Account

A verification code has been sent to your phone. This code will be valid for 15 minutes

Verification Code

Enter your 6 digit verification code

Didn't recieve a code? [Resend](#)

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Verify and Continue