



# BlueStem Client Portal Black Diamond Digital Enrollment

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## STEP 1 - GETTING STARTED

- You will receive an email titled, "Invitation to register – Client Access Portal" from BlueStem Wealth Partners. Included in this email is a link to set up your account.
- Click on the "Set Up Account" button or copy and paste the full URL into your browser. For security purposes, your set up link will expire after 7 calendar days.
- Should the link expire, let us know and we will be happy to resend the email with a new set up link.

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## STEP 2 - SECURITY QUESTIONS

- Click the link within the email (or copying and pasting it into your browser), and you will be prompted to set security questions.
- It is required that you choose a security question from the preexisting lists and set up all three questions.
- Click "Next."

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## STEP 3 - ESTABLISH YOUR PASSWORD

- Please enter a chosen password in the first form field.
- It must be at least 6 characters, including both an upper- and lower-case letter, a number and a special character, i.e. Test#1.
- 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, click "Next."

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## STEP 4 - FINAL STEP

- The final step is to accept the "Application Terms of Use."
- Scroll to the bottom to click on the "accept" button.
- After accepting, you will be automatically directed to your personalized client portal. You will also receive a confirmation email letting you know your password has been updated.

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## OPTIONAL

- You have the option to download the mobile app to your phone or tablet.
- We are using a platform from Black Diamond, a leader in the financial services industry.
- Download the application "Black Diamond Wealth Platform" from either the Apple Store or Google Play.
- The same username and password will give you access from either your desktop or mobile device.

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## Get in Touch

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