

PRODUCT BRIEF

The Black Diamond Annuities & Insurance Marketplace

In today's competitive landscape, retaining and growing client assets while scaling firm capabilities is essential.

The Black Diamond Annuities & Insurance Marketplace (AIM) provides integrated access to robust annuity and insurance solutions, empowering firms to enhance their client offerings.



How AIM Works

In partnership with DPL Financial Partners, AIM connects advisors to a curated marketplace of low-cost, commission-free annuities and insurance solutions.

Advisors log in via single sign-on, view annuity data alongside traditional assets, and work with consultants on a client-by-client basis. Back-office tools enable streamlined annuity management, repapering, and policy analysis—all of which are embedded within existing workflows. Advisors manage the account directly, integrating protection strategies into each client's broader financial plan, right from the platforms they already use.

With AIM, advisors can leverage integrated access to a curated list of best-in-class solutions, interactive tools, modeling capabilities, and educational resources designed to elevate client conversations.



Fiduciary Friendly Annuities

AIM gives advisors access to top-rated carriers and a variety of insurance and annuity products, including fixed indexed annuities, variable annuities, income annuities, MYGAs, and hybrid LTC, all curated for fiduciary use. These solutions are designed to help meet client goals around retirement income, principal protection, tax deferral, and risk mitigation, all within a fiduciary framework.

With no commissions or hidden fees, advisors can deliver value through transparent pricing and personalized guidance that keeps clients at the center.

“The Black Diamond Annuities & Insurance Marketplace helps us holistically scan the insurance marketplace. We can then serve our clients as true consultants in a meaningful and effective way.”

— **Brian Pultman**
CEO/Founder and CFP®



Best-In-Class Insurance

Advisors can meet a broad range of protection needs through AIM's commission-free portfolio of life, disability, and long-term care insurance. Whether supporting estate planning, income replacement, or care planning later in life, insurance-licensed consultants help identify the right fit for each client's goals.

With access to top-rated carriers and multiple policy types, including traditional and hybrid options, AIM empowers advisors to tailor protection strategies for every stage of a client's life.



Unified Insurance Solutions

AIM provides seamless access to protection solutions as part of an advisors' core workflow.

From discovery to implementation, insurance and annuity strategies can be viewed, managed, and reported on alongside the rest of a client's portfolio. There's no need to toggle between systems or manage disconnected tools; AIM delivers a cohesive experience designed to support holistic planning and enhance client outcomes.

AIM enables you to:

- **Mitigate Risk:** Enhance portfolio resilience with strategic insurance solutions
- **Generate Income:** Create guaranteed retirement income streams efficiently
- **Expand Oversight:** Bring held-away assets under your fiduciary management
- **Optimize Strategies:** Repurpose legacy annuities for improved client outcomes

For More Information

Strengthen your firm's insurance and annuity strategy with integrated solutions designed for fiduciaries. Connect with us to learn how Black Diamond, in partnership with DPL Financial Partners, can support your long-term success.

sscblackdiamond.com

AIM@dplfp.com

1-888-680-0830

This communication is provided by SS&C Advent, a business unit of SS&C Technologies, for information purposes only and should not be construed as or relied on in lieu of, and does not constitute, legal advice on any matter whatsoever discussed herein. SS&C Advent shall have no liability in connection with this communication or any reliance thereon.

©2025 SS&C Technologies Holdings, Inc. SS&C Black Diamond Wealth Solutions is an offering of SS&C Advent, a division of SS&C.