

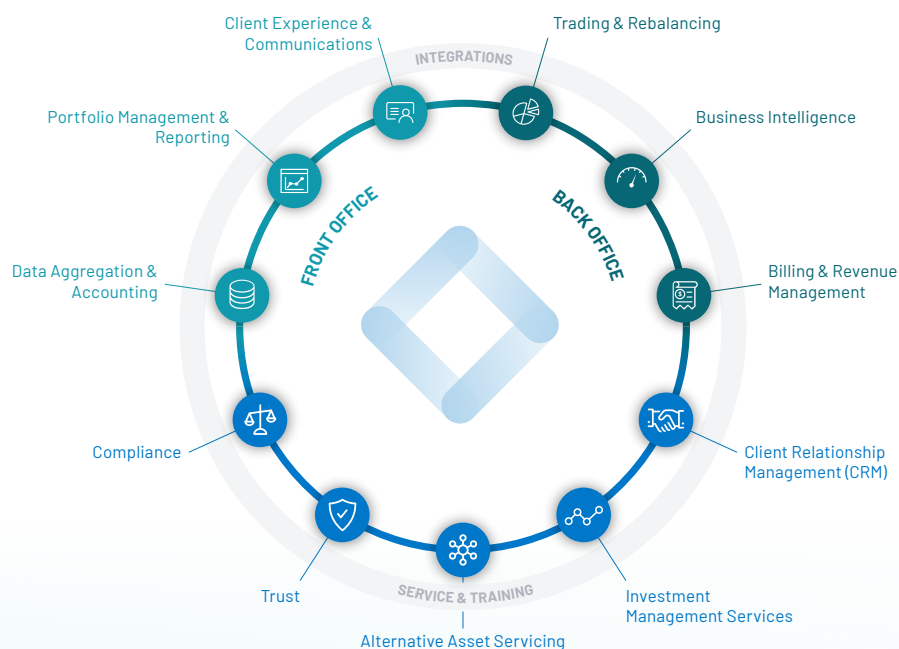
PRODUCT BRIEF

Streamline Your Wealth Management Firm's Success

SS&C Black Diamond® Wealth Solutions combines deep financial services expertise with innovative technology to deliver a uniquely integrated business model.

This award-winning, cloud-native solution is built to support the complex needs of modern advisory firms. With capabilities spanning performance reporting, portfolio rebalancing, specialized CRMs, and a dynamic client portal, and more, Black Diamond brings intelligent systems together in a seamless, unified experience.

Whether serving a boutique firm or a large enterprise, the platform drives operational efficiency, delivers actionable insights, and strengthens client engagement, all while adapting to your unique business model.



Empower your firm to deliver tailored solution packages, an exceptional user experience, and streamline service and support.

The Black Diamond Difference:

- Dedicated support from a service team that understands your business and delivers tailored solutions.
- User-friendly platform designed to drive client engagement and adoption.
- Industry-leading data and integration network.
- Flexible, relationship-based pricing that aligns with your firm's needs.

Harness Comprehensive Solutions

Discover how SS&C Black Diamond Wealth Solutions empowers firms to expand their growth and drive efficiency.

Compliance & Surveillance

Leverage a web-based environment to verify supervisory activities and ensure consistent policy execution. Black Diamond offers a library of compliance tests to meet SEC, FINRA, and USA Patriot/Bank Secrecy Act regulations. Firms can select and use only the modules necessary for their specific needs.

Trust & Retirement Services

Clients expect more from their trust and wealth providers than ever before. Our Trust and Retirement services seamlessly integrate your firm's front-office tools, powered by your back-office data. Designed to be configured to the unique needs of your business, firms can leverage cutting-edge solutions to help provide the information their clients want to see.

Alternative Asset Servicing

Asset allocations in alternative investments continue to increase as investors seek further diversification and protection from market volatility. We can help aggregate your siloed data, deliver the analytics needed to support investors, and empower you to make data-driven decisions on alternative asset classes that deliver results.

Investment Management Services & Model Marketplace

Our investment management services seamlessly integrate with the Rebalancer tool to streamline proposal generation and model assignment so that you can focus on the work that matters.

CRM Solutions

Leveraging technology is crucial to meeting clients' demands for a personalized and comprehensive view of their financial lives. Our diverse CRM solutions can streamline your operations, giving you the tools to deliver exceptional financial guidance and stand out.

For more information

If you would like to learn how SS&C Black Diamond Wealth Solutions can support your wealth management firm, visit sscblackdiamond.com, call 1-800-727-0605, or email info@sscblackdiamond.com today.

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Black Diamond By the Numbers

770K+

active firm and client users

3,000+

clients serviced globally

17M

investor accounts

\$3.3T

Global AUM platforms

Key Benefits:

Optimize Operations: One platform for all wealth management needs.

Comprehensive Ecosystem: Integrates portfolio management, customizable reporting, and financial planning.

Boost Profitability: Reduce total cost of ownership with efficiency gains and lower operational overhead.

Enhance Advisor Performance: Streamline client management with data-driven insights and automation.

Strengthen Investor Experiences: Cultivate stronger client relationships and broaden market reach with tailored approaches, seamless omnichannel communication, and predictive analytics.