



NEWS RELEASE

# Brooks Macdonald Partners with SS&C to Transform Wealth Business

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To directly support the company's future growth, Brooks Macdonald selected SS&C as a partner of choice to implement integrated technology offerings and operational services

WINDSOR, Conn., Oct. 27, 2020 /PRNewswire/ -- SS&C Technologies Holdings, Inc. (Nasdaq: SSNC) today announced that Brooks Macdonald, one of the U.K.'s leading wealth managers, has partnered with SS&C to transform its intermediary-focused business in the U.K. and the Channel Islands. The partnership encompasses technology and operational services to transform adviser experience and client service. The collaboration will enhance Brooks Macdonald's centralised investment capability, create a scalable and efficient administration function, and provide a platform for future innovation.



Commenting on the new partnership, Caroline Connellan, Brooks Macdonald's CEO, said: "I am delighted we have agreed a partnership with SS&C as part of our vision for Brooks Macdonald as the leading investment manager for intermediaries. We are committed to delivering a best-in-class adviser experience as well as excellent client service, and this exciting partnership with SS&C will further enhance the strong relationships we have today.

"We are uniquely positioned with our focus on advisers and trustees, with a market-leading proposition and strong investment performance. SS&C has an impressive track record and credentials, and through our discussions I have been impressed by their innovative and customer-focused culture. Their proven track record in delivering leading-edge technology solutions, alongside their deep knowledge and expertise in this area, will allow us to further enhance and differentiate our offering."

As part of the arrangement, Brooks Macdonald will consolidate its operations on SS&C technology to support its growth and innovation. Brooks Macdonald will leverage an integrated wealth investment platform to facilitate upgrades to their adviser experience and client service.

By 2021, SS&C will transition Brooks Macdonald's operations to its market-leading technology and deploy its end-to-end wealth technology stack. Solutions include the SS&C Investrack digital service layer and Advent Genesis, the ground-breaking portfolio management and rebalancing platform with integrated order management and investor recordkeeping capabilities.

SS&C will welcome a number of Brooks Macdonald operations colleagues to its team as part of the partnership.

"We are delighted to partner with Brooks Macdonald to bring innovative leading-edge solutions to the adviser marketplace," said Bill Stone, Chairman and CEO, SS&C Technologies. "SS&C and Brooks Macdonald are committed to delivering exceptional technology and service to advisers and their investors. We look forward to the partnership with Brooks Macdonald and to welcoming some of their talented and experienced team to the SS&C family as part of the partnership."

#### About Brooks Macdonald

Brooks Macdonald Group plc, through its various subsidiaries, provides leading investment management services in the U.K. and internationally. The Group, which was founded in 1991 and began trading on AIM in 2005, had Discretionary Funds under Management of £13.7 billion as at 30 September 2020.

Brooks Macdonald offers a range of investment management services to private high net worth individuals, pension funds, institutions, charities and trusts. The Group also provides financial planning as well as offshore investment management and acts as fund manager to two regulated OEICs (the IFSL Brooks Macdonald Fund and the SVS Cornelian Investment Funds) providing a range of risk-managed multi-asset funds and a specialised absolute return fund.

The Group has twelve offices across the UK and the Channel Islands including London, East Anglia, Hampshire, Leamington Spa, Leeds, Manchester, Taunton, Tunbridge Wells, Scotland, Wales, Jersey and Guernsey.

#### About SS&C Technologies

SS&C is a global provider of services and software for the financial services and healthcare industries. Founded in 1986, SS&C is headquartered in Windsor, Connecticut, and has offices around the world. Some 18,000 financial services and healthcare organizations, from the world's largest companies to small and mid-market firms, rely on SS&C for expertise, scale and technology.

SOURCE: SS&C

Additional information about SS&C (Nasdaq: SSNC) is available at [www.ssctech.com](http://www.ssctech.com).

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