



NEWS RELEASE

Davis Advisors Reaffirms Its Transfer Agency Commitment to SS&C With 5-Year Extension

5/19/2021

SS&C GIDS will back Davis Advisors' strategic initiatives

WINDSOR, Conn., May 19, 2021 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced that Davis Advisors, a leading equity specialist, has extended its transfer agency services relationship with SS&C for an additional five years. SS&C Global Investor and Distribution Solutions (GIDS) will continue to provide BPO and transfer agency services to the \$30B AUM asset manager. Additionally, the firms will cooperate on strategic initiatives important to Davis Advisors, including fraud prevention and digitizing financial advisors' communications with clients.



"SS&C GIDS provides a comprehensive transfer agency solution for our funds, and we are pleased to extend our relationship," said Ken Eich, Chief Operating Officer. "SS&C's strategy and investments in leading-edge technologies were key differentiators. We were particularly impressed with the fraud prevention solutions that SS&C has already implemented in addition to their roadmap of upcoming solutions."

SS&C GIDS provides the full range of transfer agency services, including recordkeeping, unique data-driven operational insights, real-time transparent oversight, intelligent automation, and state-of-the-art digital tools for Davis Advisors' shareholders. Additionally, Davis has recently added to the functionality offered to its intermediary partners via SS&C's portal for financial advisors.

"We are pleased to continue our long-standing partnership with Davis," said Nick Wright, Head of SS&C Global Investor and Distribution Solutions. "Our clients, like Davis, depend on us to represent their brands to their investors and advisors. We demonstrated our significant investment in our technology and services to support a seamless global digital experience, and we continue to evolve with our customers each step of the way."

About Davis Advisors

Davis Advisors is an independent, employee-owned investment management firm founded in 1969 with over \$30 billion in AUM. Our time-tested **investment discipline** is offered to clients through mutual funds, variable annuities, separately managed accounts, and offshore funds. Since our founding more than 45 years ago, our mission has been to serve our shareholders and to do so with high integrity. We seek to build wealth for shareholders through a patient, long-term investment approach.

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.

Follow SS&C on [Twitter](#), [LinkedIn](#) and [Facebook](#).

 View original content to download multimedia:<http://www.prnewswire.com/news-releases/davis-advisors-reaffirms-its-transfer-agency-commitment-to-ssc-with-5-year-extension-301294829.html>

SOURCE SS&C