



NEWS RELEASE

Implemented Portfolios Renews and Extends Relationship with SS&C

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Australia-based Individually Managed Account (IMA) specialist chooses SS&C Global Wealth Platform (GWP)
WINDSOR, Conn., Sept. 2, 2020 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced that **Implemented Portfolios** has chosen SS&C's **Global Wealth Platform (GWP)** as their end-to-end solution for modeling, investment administration, custody and reporting for individually managed accounts (IMAs).



Last year, Implemented Portfolios conducted a detailed review of its target operating model and systems, choosing to renew its partnership with SS&C, and extended its Global Wealth Platform (GWP) license. SS&C stood out as a technology partner because of a mutual desire between both companies to work together to further develop existing technology, in order to build best-of-breed IMA capabilities. SS&C also had a thorough understanding of the Australian marketplace and IMAs, making it an ideal choice for the Implemented Portfolios future tech stack.

GWP caters to IMA complexities and unique customer specifications without needing extensive customization.

"GWP will bolster our growing and unique IMA service business," said Greg Kirk, Chairman and Chief Executive Officer of Implemented Portfolios. "In a market where most focus solely on SMAs, SS&C offers a clear understanding of IMAs and an exceptional platform to service them. We look forward to working with SS&C to further develop the innovative system that we need to do what we do."

"Our partnership with Implemented Portfolios is important to us, and we remain focused on delivering the capabilities and expertise that will help the firm grow and succeed," said Christy Bremner, Senior Vice President, Institutional & Investment Management, SS&C Technologies.

About Implemented Portfolios

Implemented Portfolios is changing the way that investment management conversations take place in advice practices across the country. It was started in 2010, with a desire to see the relationships between advisers and clients develop and flourish. Our mission is to help advisers break free from the pure "investment manager" mold and step deeper into the role they were designed to do – helping their clients live their best lives. By providing advisers with a world class, technology enabled, individually managed accounts (IMA) service, we are freeing up precious business hours, streamlining the advice process and allowing both advisers and clients to focus on their financial values and goals.

For more information on Implemented Portfolios, visit www.implementedportfolios.com.au

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.

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