



NEWS RELEASE

LPL Financial Selects SS&C's Black Diamond for Vendor Affinity Program

7/26/2018

Black Diamond® Wealth Platform will be available to LPL's 16,000+ financial advisors WINDSOR, Conn., July 26, 2018 /PRNewswire/ -- SS&C Technologies Holdings, Inc. (Nasdaq: SSNC), a global provider of financial services software and software-enabled services, today announced that the **Black Diamond Wealth Platform** has been selected for inclusion in LPL Financial's (LPL) Vendor Affinity Program.



LPL is a leader in the retail financial advice market and is the nation's largest independent broker-dealer, with over 16,000 financial advisors. LPL's Vendor Affinity Program is designed to help advisors reduce the complexity and costs of running their businesses. Vendors are selected based on their ease of doing business with LPL advisors and have met certain security and compliance requirements.

"We are creating strategic partnerships with valued technology providers to offer data integration with their tools to make it easier for advisors to manage their businesses," said Burt White, Managing Director, Investor and Investment Solutions, and Chief Investment Officer, LPL Financial. "The addition of Black Diamond to our Vendor Affinity Program as an integrated solution creates a lot of value for our advisors. Advisors will have access to their consolidated reporting capabilities with a streamlined experience offered at a more competitive price. This is the next step in our evolving journey to deliver an enhanced and sophisticated technology experience that will drive more efficiency for our advisors."

"We are excited about Black Diamond and its continued growth," said Bill Stone, Chairman and Chief Executive Officer, SS&C Technologies. "Our relationship with LPL Financial spans decades, and we are committed to continuing to work together."

"In order to support compliance and oversight of our mutual clients, we worked with the LPL team to establish specific reporting to meet those needs," said Bob Conchiglia, Vice President, Advisory Sales, SS&C Advent. "Our latest partnership with LPL continues our mission of delivering an outstanding digital experience for advisors to elevate their client relationships and practice."

Black Diamond Wealth Platform provides advisors with a purposeful suite of tools including portfolio management, reporting, client communications and more. Today, Black Diamond serves as the hub for more than 1,200 firms managing \$700 billion in assets. Advisors use Black Diamond to manage their client's complete wealth picture, and the newest version of Investor Experience provides advisors with a clear way to differentiate their client experience in a competitive market for high-net-worth investors.

About LPL Financial

LPL Financial is a leader in the retail financial advice market and the nation's largest independent broker/dealer*. The firm serves independent financial advisors and financial institutions, providing them with the technology, research, clearing and compliance services, and practice management programs they need to create and grow thriving practices. LPL enables them to provide objective guidance to millions of American families seeking wealth management, retirement planning, financial planning and asset management solutions. **LPL.com**

Securities and Advisory Services offered through LPL Financial. A registered investment advisor, Member

FINRA/SIPC.

*Based on total revenues, Financial Planning magazine, June 1996-2017

About SS&C Technologies

SS&C is a global provider of investment and financial software-enabled services and software for the global financial services and healthcare industries. Founded in 1986, SS&C is headquartered in Windsor, Connecticut and has offices around the world. Some 13,000 financial services and healthcare organizations, from the world's largest institutions to local firms, manage and account for their investments using SS&C's products and services.

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 with multimedia:<http://www.prnewswire.com/news-releases/lpl-financial-selects-sscs-black-diamond-for-vendor-affinity-program-300687020.html>

SOURCE SS&C