



NEWS RELEASE

NorthCoast Asset Management Selects SS&C to Deliver Investment Operation Transformation

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Independent RIA chooses SS&C's Global Wealth Platform and outsourcing services to modernize and streamline their investment operations

WINDSOR, Conn., March 20, 2018 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC), a global provider of financial services software and software-enabled services, today announced that NorthCoast Asset Management LLC (NorthCoast) has chosen SS&C's leading cloud-based wealth management platform and outsourcing services to streamline its end-to-end investment process lifecycle. SS&C's Global Wealth Platform (GWP) provides NorthCoast with a system that will scale to support the firm's long-term growth.



NorthCoast is a Connecticut-based, independently owned, RIA with \$1.7 billion in assets under management. NorthCoast selected GWP for its fully integrated, cloud-based solution and unified managed account (UMA) capabilities to manage their internal and external money management business. Additionally, NorthCoast will leverage SS&C's world class data collection and reconciliation outsourcing services.

"We wanted to replace our legacy systems with a modern, cloud-based investment management solution," said Megan Hall, Senior Vice President of Operations at NorthCoast. "This partnership with SS&C provides us with a fantastic opportunity to upgrade our operations from the front-office to the back-office and achieve greater operational efficiency through SS&C's leading wealth management platform. We have an ambitious implementation timeline and SS&C was able to demonstrate a rapid but viable approach to meet these deadlines."

NorthCoast is implementing SS&C's technology and outsourcing services throughout the entire lifecycle of its investment process. GWP will provide NorthCoast a fully integrated platform that seamlessly links front, middle, and back office operations under a single operating environment for all users. GWP's advanced trading, modelling, and compliance features will support NorthCoast's investment decisions coupled with GWP's strong accounting and client reporting solutions to provide a holistic operating environment to minimize trade risk. GWP will also deliver a seamless client communications solution, eliminating error-prone data transfers and an enhanced customer experience.

"Capturing market opportunity, managing exposures, and achieving business objectives for growth requires a nimble operational infrastructure that can easily adapt to the ever-evolving investment market," said Eric Rocks, Managing Director, Institutional and Investment Management. "We worked closely with NorthCoast to identify the right combination of solutions to match their unique investment needs. This resulted in a single solution spanning from front office portfolio management to complex transaction-driven accounting in the back office."

About NorthCoast Asset Management

NorthCoast Asset Management LLC is an Investment Advisor registered with the SEC. Founded in 1988 and based in Greenwich, CT, NorthCoast specializes in quantitative research and managing rules-based investment programs for clients and institutions around the world.

About SS&C Technologies

SS&C is a global provider of investment and financial software-enabled services and software for the global financial services industry. Founded in 1986, SS&C is headquartered in Windsor, Connecticut and has offices around the world. Some 11,000 financial services organizations, from the world's largest institutions to local firms, manage and account for their investments using SS&C's products and services.

Additional information about SS&C (Nasdaq: SSNC) is available at www.ssctech.com. Follow SS&C on [Twitter](#), [LinkedIn](#) and [Facebook](#).

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SOURCE SS&C

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