



NEWS RELEASE

Portfolio Solutions and SS&C Expand Partnership with Salentica Data Broker

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Long-time client cites record of solution enhancements as key factor in expanding relationship
WINDSOR, Conn., March 12, 2019 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC), today announced that **Portfolio Solutions®**, an RIA firm with \$1.5 billion in assets under management, has expanded its relationship with SS&C adding Salentica Data Broker along with their instance of the **Black Diamond Wealth Platform**.



Portfolio Solutions has been a client of SS&C Advent since 1998 and migrated to Black Diamond in 2014. As a frequent early adopter of platform enhancements, Portfolio Solutions beta tested Black Diamond's Client Experience portal helping to shape functional requirements. Today, more than 850 Portfolio Solutions' clients leverage the Client Experience portal. Most recently, Portfolio Solutions added Salentica Data Broker, connected to their version of Salesforce, to securely integrate data across platforms. Salentica Data Broker is a state-of-the-art integration solution that enables secure data sharing with other applications used by wealth advisors, asset managers and their clients.

"We have been very impressed with SS&C's consistent delivery of enhancements that has supported our growth into a national, full-service wealth management advisor," said James S. Gladney, Portfolio Solutions Chairman and CEO. "We value our partnership with SS&C and look forward to leveraging Salentica Data Broker for greater insights about our client's wealth picture to continue providing unparalleled service."

"This is a shining example of the kind of partnership we build with our clients," said Bill Stone, Chairman and Chief Executive Officer, SS&C Technologies. "We've worked closely with Jim and his team over the years and value his input on our solution enhancements ensuring they meet our clients' needs. We appreciate the confidence Portfolio Solutions has shown us by extending and building upon our relationship."

About Portfolio Solutions

Headquartered in Troy, Michigan, Portfolio Solutions® is a national, full-service provider of integrated wealth planning and investment management services, led by **James S. Gladney**. We've been helping clients since 1999 to work confidently toward achieving their long-term financial goals. Portfolio Solutions® has a long-standing and enduring commitment to index investing strategies, with more than \$1.4 billion in client investment assets under management as of February 28, 2019.

For more information, visit <https://portfoliosolutions.com> and follow us on LinkedIn and Twitter.

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 18,000 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.

Additional information about

SS&C (Nasdaq: SSNC) is available at www.ssctech.com.

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