



NEWS RELEASE

SS&C Announces Expanded Black Diamond Integrations with Schwab Advisor Center®

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WINDSOR, Conn., Aug. 10, 2020 /PRNewswire/ -- [SS&C Technologies Holdings, Inc.](#) (Nasdaq: SSNC) today announced new integrations for SS&C Advent's **Black Diamond Wealth Platform** with Schwab (NYSE: SCHW) Advisor Center®. These integrations provide users of Schwab's custodial platform with additional opportunities to eliminate paper-based processes and further digitize their workflows.



The latest integration enhancements include:

- Straight-through processing of management fees: Through Black Diamond's client billing functionality, advisors can send management fees directly to Schwab with a few clicks.
- Digital address change: Address changes can be digitally initiated within Black Diamond, without the need for paper forms.
- Service center: Advisors can now create Service Requests for Schwab's service teams and check the status of open cases directly from within Black Diamond.
- Straight-through processing of trades through the Financial Information Exchange (FIX®) network: Advisors can place trades faster, more efficiently, and with less risk of errors directly from Black Diamond Rebalancer's trading system.

The new features add to existing integrations with the Schwab Advisor Services platform, which include digital account opening, single sign-on, and money transfer capabilities. Also, Schwab statements and tax documents can be shared automatically to each end client's Black Diamond Client Experience Portal. Advisors can view transactions, balances and positions in near-real-time, and have secure, real-time access to account-level data from Schwab Advisor Center.

"We are continually partnering with Schwab to build on our long-standing integration agreement," said Steve Leivent, Senior Vice President and Co-General Manager of SS&C Advent. "These latest enhancements will save advisors time and improve accuracy so they can continue building on their client relationships."

"The recent integration enhancements with Black Diamond allow advisors who use Schwab to streamline their workflows further and complete most tasks online. These integrations align well with our continuing goal to provide advisors with the tools they need to enhance the advisor experience, as well as the experience of their clients," said Kartik Srinivasan, Managing Director, Digital Product Management for Schwab Advisor Services

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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