



NEWS RELEASE

SS&C Announces Integration with Box's Cloud Content Management Solution

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Box integration with SS&C Black Diamond enables advisors to access files easily and securely from customizable, cloud-based, all-in-one platform

WINDSOR, Conn., Nov. 5, 2018 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC), a global provider of financial services software and software-enabled services, today announced an integration between its Black Diamond® Wealth Platform and **Box**, a leader in cloud content management. The addition of Box to Black Diamond's vast **integration network** enables advisory firms to tailor their tech-stack to fit their unique needs, all from one seamless platform.



Black Diamond boasts a robust Client Experience portal which arms investors with insight into their complete wealth picture anytime, anywhere. The inclusion of a native Document Vault lets advisors and clients share critical documents quickly and securely. For the many advisory firms already using Box as their cloud content management platform, Black Diamond now provides a frictionless, two-way integration with Box making all files and folders visible and shareable across the two platforms.

"The client experience offered through the Black Diamond Wealth Platform transforms how advisors conduct business with their customers," said Steve Leivent, SVP Advisory, SS&C Advent. "We're excited to offer Box's enterprise-grade content management capabilities directly within our platform, which is designed to promote client engagement while boosting advisor efficiency."

Over half of firms using Black Diamond have already implemented the Client Experience tool since its release in June of this year. One of the main adoption drivers continues to be the inclusion of meaningful integrations with industry leading solutions, such as the integration with Box.

"The need for organizations to move fast and operate in a modern way is more important than ever before," said Bijon Mehta, Managing Director, Financial Services at Box. "The wealth management industry is evolving, and advisors and investors alike expect advanced tools to make communication more streamlined and efficient. We're excited to provide Black Diamond customers with the ability to further customize the experience they deliver to clients."

"Advisors need the latest technology and tight integrations to reduce friction around client communications," said Bjorn Widerstedt, Senior Director for Black Diamond, SS&C Advent. "We constantly look to leverage the best technology solutions to keep us on the leading edge of innovation and provide our clients a competitive advantage."

The Black Diamond Wealth Platform continues to revolutionize the wealth management experience. Known for an open, cloud-based, API infrastructure, Black Diamond's vast integration network equips advisors with a customizable all-in-one wealth management platform. For more details, [visit the product page](#).

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.

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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