



NEWS RELEASE

SS&C Announces New Black Diamond Integrations with TD Ameritrade, Schwab, Fidelity and Pershing

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Integrations help advisors streamline account openings and automate document delivery

WINDSOR, Conn., June 11, 2019 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced the **Black Diamond Wealth Platform** now offers more integration options with the advisory platforms of leading custodians, TD Ameritrade, Schwab, Fidelity and Pershing.



Advisors using Black Diamond and TD Ameritrade's Institutional Veo One® advisor platform can seamlessly pass data from Black Diamond to Veo One's new account opening "wizard."

"TD Ameritrade Institutional is committed to helping advisors conduct their business with flexibility and ease, and access client account information from one consolidated view with a single sign-on," said Jon Patullo, Managing Director of Technology Product Management at TD Ameritrade Institutional. "The Veo® Account Opening Wizard creates a wholly digital and frictionless on-boarding experience, and we're excited to bring this collaborative innovation to Black Diamond users."

Expanding on workflow integrations using Schwab OpenView Gateway®, Black Diamond has launched a direct connection to Schwab's Digital Account Open guided experience. Advisors can launch the account opening flow directly from Black Diamond and easily link back to Schwab Advisor Center.

"Advisors want technology that enhances how they can connect with their clients," said John Connor, Vice President at Schwab Advisor Services. "We're happy to work with Black Diamond on the account open integration to make the advisor-investor dialogue even easier."

The Black Diamond team is engaged in similar digital account opening initiatives with Pershing and Fidelity with delivery expected later this year. The automated delivery of custodial documents, such as statements and tax documents, from those firms' advisory platforms is also on the roadmap. This will eliminate the need for advisors to download documents manually and enables them to share custodial information more quickly via the Black Diamond Client Experience.

"Technology integrations with leading custodians provide advisors with the operational efficiencies and abilities they need to delight their clients," said Robert Roley, General Manager of SS&C Advent. "Our focus on integrations keeps us on the leading edge of innovation and provides our clients a competitive advantage."

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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