



NEWS RELEASE

SS&C Automates Retirement Plan Onboarding

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Digital Plan Onboarding Process simplifies participant onboarding and recordkeeper communications in a post-COVID-19 environment

WINDSOR, Conn., Aug. 25, 2020 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced that SS&C Retirement Solutions has launched the Digital Plan Onboarding Process to help recordkeepers bring on and support retirement plans.



"We are excited to see SS&C modernize the approach to retirement plan onboarding," said Mike Shamburger, Head of Core Markets at T. Rowe Price Retirement Plan Services. "In our increasingly digital world, it's critical to have a standardized, easy-to-implement and repeatable way of engaging with our customers."

SS&C leverages e-Investor, an end-to-end platform that automates processing of investor transactions, and API technology to automate the retirement plan onboarding process through a single electronic interface. The digital approach reduces touch points and error-prone hand-offs between advisors, sponsors and recordkeepers. SS&C Retirement Solutions also added enhanced tracking metrics for sales opportunities during plan implementations, improved security and auditability through eSignatures.

"We are digitizing a highly regulated, manual process. We believe there are a lot of opportunities to optimize onboarding, from the sale of a plan to the full recordkeeping of retirement assets," said Kevin Rafferty, General Manager, SS&C Retirement Solutions. "In the aftermath of COVID-19, the industry requires new and innovative ways, such as digital onboarding, to reengage plan sponsors."

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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