



NEWS RELEASE

## SS&C Celebrates Black Diamond Wealth Platform \$1 Trillion in Assets Milestone

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Black Diamond manages complete wealth picture with purposeful suite of tools and best-of-breed integrations for more than \$1 trillion assets

WINDSOR, Conn., May 7, 2019 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC), today announced that its **Black Diamond Wealth Platform** now manages over \$1 trillion in assets for more than 1,400 clients.



The 1,400 plus firms have chosen Black Diamond to improve client experience, drive operational efficiencies and grow with scale. More than 260 of those clients signed on in 2018 alone. Black Diamond's growth coincides with its increasing integration network across custodians, CRMs, financial planning, risk and more; further positioning Black Diamond as an advisor's complete business hub.

Notable additions of marquee names from the advisory community include: Salomon & Ludwin, Patriot Financial Group, Plante Moran Financial Advisors, LLC, Western International Securities, Inc. (WIS), F3Logic, Eclectic Associates and Slatestone Wealth, LLC.

Salomon & Ludwin conducted an extensive review before ultimately choosing Black Diamond to help their transition from a brokerage to a RIA. "This was a pivotal change for us and we needed the best reporting platform possible for our transition," said Dan Ludwin, President and Founding Partner, Salomon & Ludwin. "Our clients rave about Black Diamond. They cite the depth of information available, and its sophisticated but simple navigation and layout. Through it all, Black Diamond is the best decision we made!"

Patriot Financial Group also chose Black Diamond to support their growth as an independent RIA. "We know we have chosen the right partner with Black Diamond," said Michael Tashjian, CEO, Patriot Financial Group. "The team has been incredibly helpful, responsive and flexible when customizing the technology to fit our needs at a cost that was far superior to their competition."

"This surge in interest for Black Diamond highlights the need within the RIA industry for technology that provides truly comprehensive wealth management," said Robert Roley, General Manager of SS&C Advent. "We are honored when firms choose Black Diamond to be their platform for growth. Our team is committed to driving further advisor-centric innovation to continue positioning our clients for success."

#### 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](http://www.ssctech.com).

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