



NEWS RELEASE

SS&C Expands Managed Account Offering with Investnet Retirement Solutions

10/23/2018

DST Retirement Solutions enters agreement with Investnet Retirement Solutions to further diversify retirement ecosystem and provide customers with an additional Managed Account choice

WINDSOR, Conn., Oct. 23, 2018 /PRNewswire/ -- SS&C Technologies Holdings, Inc. (Nasdaq: SSNC), a global provider of financial services software and software-enabled services, today announced a collaborative agreement with Investnet Retirement Solutions (ERS) to integrate its Managed Account solution with SS&C's retirement record keeping platform, TRAC®.



"One of the keys to our TRAC retirement account servicing platform is the ability to provide clients with choice and flexibility," said John Geli, president of Retirement Solutions, SS&C Technologies. "We are pleased to partner with ERS to give our clients another Managed Account option to help them differentiate and better serve their clients."

To be a leader in the retirement space, a provider must keep up with the changing regulatory environment, technology advancements and the evolving advisor and consumer demand for control. A key opportunity for plan sponsors to stay at the forefront of these changes and improve retirement outcomes is leveraging increasingly popular Managed Account solutions. Adding the ERS offering to the DST retirement ecosystem enables retirement providers to meet the diverse needs of the defined contribution marketplace. TRAC currently supports multiple managed account solutions and the partnership with ERS is the latest addition.

Babu Sivadasan, group president of Investnet Retirement Solutions said, "Our partnership with SS&C will deliver one of the most comprehensive and dynamic Managed Account solutions in the market today. One size doesn't fit all, which is why we built a solution personalized for each participant that can be adapted by the advisor. ERS can merely be the technology (i.e., "robo") solution matched with the advisor's customized investment solution. The advisor can also outsource any aspect of the solution to third party strategists including ERS, from Capital Markets Assumptions to the Asset Class Portfolios to the fund selection. The core feature of ERS's partnership will be to allow plan providers to build both opt-in Managed Accounts and Managed QDIAs, enabling advisor partners to provide individualized glide paths to optimize each participant's accumulation and post-retirement decumulation."

About Investnet

Investnet, Inc. (NYSE: ENV) is a leading provider of intelligent systems for wealth management and financial wellness. Investnet's unified technology enhances advisor productivity and strengthens the wealth management process. Investnet empowers enterprises and advisors to more fully understand their clients and deliver better outcomes.

Investnet enables financial advisors to better manage client outcomes and strengthen their practices. Institutional-quality research and advanced portfolio solutions are provided through Investnet | PMC, our Portfolio Management Consultants group. Investnet | Yodlee is a leading data aggregation and data analytics platform powering dynamic, cloud-based innovation for digital financial services. Investnet | Tamarac provides leading rebalancing, reporting, and practice management software for advisors. Investnet | Retirement Solutions provides an integrated platform that combines leading practice management technology, research, data aggregation and fiduciary managed account solutions.

More than 88,000 advisors and more than 3,500 companies including: 15 of the 20 largest U.S. banks, 43 of the 50 largest wealth management and brokerage firms, over 500 of the largest Registered Investment Advisers, and hundreds of Internet services companies, leverage Envestnet technology and services. Envestnet solutions enhance knowledge of the client, accelerate client on-boarding, improve client digital experiences, and help drive better outcomes for enterprises, advisors, and their clients. For more information on Envestnet, please visit www.envestnet.com and follow [@ENVintel](https://twitter.com/ENVintel).

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.

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