



NEWS RELEASE

SS&C Launches Investor Experience: Enhanced Client Portal on the Black Diamond Platform

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Enhanced client portal helps advisors connect and build long-term relationships with clients
WINDSOR, Conn., May 7, 2018 /PRNewswire/ -- SS&C Technologies Holdings, Inc. (Nasdaq: SSNC), a global provider of financial services software and software-enabled services, today announced the latest innovation to the Black Diamond wealth platform, Investor Experience, a next-generation client portal. **Investor Experience** allows advisors to offer their clients a personalized, custom-branded and interactive online environment, accessible anytime, anywhere on any device.

Investor Experience was designed to differentiate advisors in a competitive market for high-net-worth investors where digital channels can decide relationships. Investor Experience empowers advisors to custom-tailor content for their client's unique financial picture. The new portal gives investors direct access to their advisory team and to all of their financial data, 24/7. Investors can personalize their experience so they have a clear picture of their spending, budgeting and goal tracking. The portal features a relationship timeline, which visualizes key interactions and decisions that have occurred throughout the course of the partnership clearly showing advisors commitment and value to their clients.

"Black Diamond's new Investor Experience provides an intuitive and aesthetically pleasing platform that allows our clients to have a comprehensive view of their wealth," said Doug Turner, Principal and Director of Operations, Diversified Trust. "Black Diamond's constant innovation provides us with the tools and technology we need to deliver an outstanding digital experience to our clients."





Black Diamond

WEALTH PLATFORM

As part of the new launch, Black Diamond also announced a new Black Diamond logo. After discussing the solution's brand with clients and partners, the feedback determined that evolving Black Diamond's identity would showcase the new features while maintaining its existing strong awareness among leading advisors. The new brand embodies a platform that is reinventing itself, and is steadfast in its commitment to advisors and investors.

"Over 1,200 advisors and wealth managers rely on Black Diamond. Staying ahead of the curve to anticipate and meet our clients' needs is at the center of our strategy. Black Diamond's evolution on behalf of advisors and our new identity reflect that," said Steve Leivent, SVP of Advisory Client Experience, and SS&C Advent. "The Black Diamond Wealth Platform's new logo and branding represent this larger vision."

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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