



NEWS RELEASE

SS&C Marks Momentum Post Salentica Acquisition

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Client footprint expands at record pace, experiencing over 40 percent growth and advising over \$850 billion in assets.

WINDSOR, Conn., April 11, 2018 /PRNewswire/ -- SS&C Technologies Holdings, Inc. (Nasdaq: SSNC), a global provider of financial services software and software-enabled services, today announced that after a successful acquisition and a number of product releases, SS&C Salentica has seen over 40 percent growth within its client base, which advise on over \$850 billion in assets.



Since the acquisition closed in late 2016, SS&C has focused on strengthening Salentica's CRM capabilities for wealth advisors, asset managers, and their clients. Salentica added new integrations to its Data Broker platform including the Black Diamond® Wealth Platform, Advent Portfolio Exchange® (APX) and Axyx® as well as a number of other products including **Modestspark** and MoneyGuidePro. By partnering with Microsoft® and leveraging the Dynamics 365 platform, Salentica CRM is available for deployment in Microsoft's Cloud, on premise, and in Salentica's privately-hosted model.

Many existing clients are leveraging these new capabilities to expand and improve client relationships. Recently, Wasmer, Schroeder & Company, an RIA and fixed-income specialist in Naples, FL, launched Salentica CRM to bolster its technology suite. Since they use APX as their portfolio management solution, key to their selection was Salentica's CRM capabilities enabling two-way integration for portfolio creation. This allowed for simpler portfolio and contact changes between their CRM and APX.

"We owe much of our recent success to the trust our clients have placed in us to help them overcome the complexities of managing their client relationships," said Dave Ireland, Co-General Manager, SS&C Salentica. "Since joining SS&C, we have realized a number of important milestones and we have seen the benefits of joint initiatives between **SS&C and Salentica solutions**. We look forward to building on this momentum and delivering more value to wealth managers and their firms."

About Wasmer Shroeder & Company

Wasmer, Schroeder & Company is an advisory firm specializing in Separately Managed Account (SMA) management. We adhere to a discipline whereby our investment process and focus on client-service drives our mission. Wasmer, Schroeder & Company is a premier provider in the industry focused on dedication to excellence in fixed-income portfolio management, and to promoting a culture of positive impact on economic, community and environmental conditions in financial markets.

About SS&C Technologies

SS&C is a global provider of investment and financial software-enabled services and software for the global financial services industry. Founded in 1986, SS&C is headquartered in Windsor, Connecticut and has offices around the world. Some 11,000 financial services organizations, from the world's largest institutions to local firms, manage and account for their investments using SS&C's products and services.

SOURCE: SS&C

Additional information about SS&C (Nasdaq:SSNC) is available at www.ssctech.com.

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