



NEWS RELEASE

SS&C's Black Diamond Wealth Platform Launches Command Center for Investment Advisors

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The Client View application centralizes all client-focused workflows in one place

WINDSOR, Conn., Sept. 22, 2020 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC)

today announced the launch of Client View, a new application within SS&C's **Black Diamond® Wealth Platform**.

The application brings together all of the platform's client-focused tools in an informational, interconnected, and actionable "command center" to help advisors manage their clients' financial lives.



"Consolidating all aspects of client management into a single application will improve operations and ultimately help me deliver a more personalized client experience," said Brian Boughner, Principal, Parallel Financial. "My firm values our partnership with Black Diamond as they consistently innovate with the advisor and their clients in mind."

Client View represents a foundational shift in the WealthTech industry, emphasizing a merger of portfolio management and reporting with client-centric communications. Within a single space, advisors can view and manage clients' key household information and contact details and analyze their financial life. Balance sheet collaboration, report generation, portfolio monitoring, direct client communications, and document sharing are some of the features included in the application. Integrated content relevant to each relationship complements the experience with custodial accounts, financial planning, risk analytics, and CRM. Firms have the flexibility to customize their experience based on the features they use the most.

"Investment advisors want to continue to differentiate their firms by delivering a superior client experience," said Steve Leivent, Senior Vice President and Co-General Manager of SS&C Advent. "Client View provides advisors with a holistic view of each relationship so they can proactively tailor their capabilities to each client's individual needs."

The rollout plan for Client View calls for an introductory preview of the application's functionality with select Black Diamond client firms, followed by a broader release by year end.

More than 1,600 wealth management and advisory firms rely on the Black Diamond Wealth Platform as the hub of their business. The introduction of Client View corresponds with the launch of a new **Black Diamond site** highlighting the platform's comprehensive features and usability in a contemporary, tech-forward environment.


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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