



NEWS RELEASE

Trustees Executors Leverages SS&C Platform to Launch New Business

11/9/2021

Storied New Zealand-based financial and trust solutions provider chooses SS&C Aloha

WINDSOR, Conn., Nov. 9, 2021 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced **Trustees Executors Limited** has chosen the all-new investment operations platform SS&C Aloha for its new managed-money account joint venture, Flint Wealth. SS&C Aloha provides Flint Wealth with extensive front-to-back asset class support within a single intuitive platform. In addition, Aloha enables the wealth management firm to create a digital backbone to deliver investment services backed by leading Machine Learning, Predictive Analytics, Natural Language Processing and Intelligent Workflow technologies.



Established in 1881, Trustees Executors has steadily grown from its original trust and estate business to provide a full range of financial and trust solutions. Recently they expanded to wrap account wealth management with the launch of Flint Wealth. SS&C Aloha's single data model, microservices architecture and digital capabilities were prime enablers for the new investment service, which draws varied investments together in an individual investment portfolio, professionally managed for a flat fee.

"Of the solutions we reviewed, SS&C Aloha was the best choice to meet our strategic vision for the new venture," said CEO Ryan Bessemer. "We want to provide clients with a consolidated view of their investments, a wide pool of potential investments, and a great user experience. SS&C Aloha's single database supports this consolidated view, and its advanced API service built on open architecture will let us connect with varied other investment providers and sources. In addition, the system's automated real-time method to exchange information and keep everything in sync means clients will always have the latest information as part of the modern interface and rich digital experience."

Trustees Executors will also provide back-office capabilities and services to support new and existing portfolio administration products in addition to Flint Wealth via the Aloha platform. In addition, they will be integrated with Trustees Executors' new Enterprise Service Bus: TE Connect.

"We are pleased to help Trustees Executors realize their vision for its new wrap offering and to help scale their operations," said Christy Bremner, SVP and General Manager, SS&C Technologies. "Aloha's integrated platform will form the digital backbone of Flint Wealth, reducing the risk for its business partners and elevating the customer experience."

SS&C Aloha powers this connected investment management environment via built-in, exception-based workflows spanning all the investment operations functions a wrap manager needs. In addition, SS&C Aloha monitors results, flags issues, and suggests next steps, all within a single experience. The next-generation platform is device-agnostic, so clients can access their data and benefit from its rich digital experience however and wherever they choose.

About Trustees Executors

Trustees Executors Limited was established in 1881 and is New Zealand's longest standing Trustee Company. The firm provides a full range of financial and trust solutions to individuals, families and the corporate sector including estate planning, trustee and investment advisory services.

Trustees Executors Limited is a Licensed Financial Markets Supervisor and a leading provider of specialist Corporate Trustee and back office fund administration services to some of New Zealand's largest financial institutions, banks and fund managers.

For more information on Trustees Executors Limited, visit <https://www.trustees.co.nz/>

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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