



NEWS RELEASE

Western International Securities Selects SS&C's Black Diamond to Revolutionize Client Experience

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Black Diamond® Wealth Platform signs 82 new clients in the 2nd quarter of 2018 with latest addition of prominent broker dealer Western International Securities

WINDSOR, Conn., July 18, 2018 /PRNewswire/ -- SS&C Technologies Holdings, Inc. (Nasdaq: SSNC), a global provider of financial services software and software-enabled services, today announced that Western International Securities ("Western"), an independent broker and advisor firm has chosen the **Black Diamond Wealth Platform** as their portfolio management, reporting and client experience solution.



Black Diamond

W E A L T H P L A T F O R M

Western International sought an intuitive and innovative solution for its base of 400 plus advisors nationwide to help them strengthen connections with their clients and prospects. Black Diamond's client portal, Investor Experience, played a key role in Western's decision as the portal allows advisors to offer their clients a personalized,

custom-branded and interactive online environment. "As technology advances, our advisors expect these capabilities," says Donald Bizub, CEO, Western International Securities. Through the portal, investors can see their financial data 24/7 and personalize their experience to have a clear picture of their spending, budgeting and goal tracking.

Along with the client portal, Black Diamond offered Western a scalable and flexible reporting solution that could grow with them as they continue to attract new teams. Already, Western has achieved greater efficiencies in its home office capabilities by centralizing reporting, business intelligence, and oversight tools with Black Diamond.

"Advisors are excited that we're moving to Black Diamond. Many are already aware of the high-quality reports and dashboards, general ease of use and the intuitive and modern client portal," said Andrew Kuo, Managing Director of Operations and Technology, Western International Securities.

"We are thrilled that Black Diamond can support Western as they continue to attract new clients," said Bob Conchiglia, Vice President, Advisory Sales, SS&C Advent. "We are committed to delivering an outstanding digital experience to our clients so they have the tools and technology to provide their clients with unmatched value and insights into their wealth."

The access roll-out will be available to Western this summer, with a launch at its annual conference in August.

About Western International Securities

Through its multiple clearing agreements, Western International Securities, Inc. (WIS) is able to provide its Advisors with the financial services and support they need to grow their business effectively. Established in 1995, the firm is headquartered in Pasadena, CA and maintains offices nationwide. Western is widely recognized as a truly unique independent broker dealer in the industry, offering an independent experience with no proprietary products. The firm supports more than 400 independent financial advisors in delivering comprehensive securities and investment advisory services to their clients. For more information about Western, please visit www.joinwestern.com.

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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