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SS&C Announces Salentica Elements for Financial Advisors on the Salesforce AppExchange, the World's Leading Enterprise Apps Marketplace

SS&C Black Diamond customers can now access new relationship management tools that will transform client engagement

WINDSOR, CT, Sept. 12, 2017 /CNW/ -- SS&C Technologies Holdings, Inc. (Nasdaq: SSNC), a global provider of financial services software and software-enabled services, today announced it has launched Salentica Elements on the Salesforce AppExchange, empowering businesses to connect with their clients, partners, and employees in entirely new ways. Salentica Elements is a CRM solution specifically designed for the unique needs of RIAs and wealth managers. The quick-start solution provides advisors a cutting-edge, advisor-specific solution that has pre-built configurations, workflows and features native integration with the [Black Diamond](#) wealth platform. Salentica Elements, packaged with Black Diamond, offers a fully integrated, efficient advisor desktop.



Built on the Force.com® by Salesforce Platform, Salentica Elements is currently available on the AppExchange at <http://blackdiamond.advent.com/elements>.

With Salentica Elements, Black Diamond clients will be able to:

- | Access daily account, portfolio, and household data from Black Diamond
- | View individual client reports created with Black Diamond
- | Maintain real-time client relationship information through a single connected platform
- | Manage data using industry-specific entities (e.g., Relationships, Portfolios, etc.)
- | Provide a single, contextual view of their clients across multiple devices
- | Create customized workflows to improve overall firm efficiency

"Financial advisors are focused on deepening relationships with clients and demonstrating the value they provide. Salentica Elements gives them an extra edge to manage client relationships with care and grow with scale," said Steve Leivent, SVP of Advisory Client Experience, SS&C Advent.

"Everyone and everything is getting smarter and more connected than ever before, and companies are looking to transform the way they connect with customers, partners, and employees," said Kori O'Brien, SVP, ISV Sales, Salesforce. "By leveraging the power of the Salesforce Platform, SS&C provides clients with an exciting new way to manage client relationships with a turnkey solution built based on best practices for advisory firms."

About Salesforce AppExchange

Salesforce AppExchange is the world's leading enterprise apps marketplace that empowers companies to sell, service, market and engage in entirely new ways. With 3,500 partner apps and more than 4 million customer installs, it is the most

comprehensive source of cloud, mobile, social, IoT, analytics and artificial intelligence technologies for businesses.

Additional Resources

- | Like Salesforce on Facebook: <http://www.facebook.com/salesforce>
- | Follow Salesforce on Twitter: <https://twitter.com/salesforce>

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About Black Diamond

One of SS&C's leading solutions for financial advisors is the Black Diamond[®] wealth platform, a portfolio management, reporting and client communications tool, serving over 1,000 firms today. Advisors can combine many other capabilities such as CRM, financial planning, and risk alignment tools into their Black Diamond experience. Salentica[®] CRM, also an SS&C solution, is one such partner. Across its CRM offering, Salentica has more than 5,000 users and an average firm size of over \$3 billion in assets.

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.

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

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