First Samuel Selects SS&C Sylvan for Post Tax Performance Analytics

Australian Wealth Manager Selects Sylvan to Calculate Pre- and Post-Tax Performance Returns

WINDSOR, Conn., May 23, 2012 (GLOBE NEWSWIRE) -- SS&C Technologies (Nasdaq:SSNC), a global provider of investment and financial software-enabled services and software, today announced that First Samuel has selected Sylvan to calculate pre- and post-tax returns across its individual investment portfolios.

SS&C's Sydney office will implement and support First Samuel's performance and attribution platform to process before- and after-tax performance returns for any number of portfolios over any time period. As part of the implementation, Sylvan will be fully integrated with the client's portfolio accounting system.

"We were impressed with the breadth of offering that SS&C had for our performance requirements," said Joe Flinn, General Manager, First Samuel. "We have been a user of SS&C's post-trade messaging network, SSCNet, for a number of years and this made us very comfortable with SS&C's capabilities and service levels. They were the natural choice when it came to selecting a technology solution to further enhance our calculation and reporting to clients of pre- and post-tax performance returns."

"We are delighted that First Samuel has chosen to partner with SS&C and our performance platform, Sylvan," said Phil Banas, Managing Director, Australia, SS&C Technologies. "Australia is ahead of the curve in its growing requirement for tax-aware portfolio management, and the wealth sector in particular has long taken into account the tax effects of investment decisions. Sylvan's post tax performance calculations give First Samuel an edge in presenting performance analytics more meaningfully reflecting the returns that clients actually get to keep and enjoy."

Sylvan is a leading performance measurement, attribution and risk calculation platform which can be integrated with any portfolio management or accounting system to provide before- and after-tax returns, contribution and attribution analytics. SSCNet is a post-trade messaging network for managers, brokers, custodians and interested parties. Confirmed trades are extracted and loaded into SSCNet which appends settlement instructions from its integrated delivery instruction database and feeds the trades through a SWIFT® gateway to the custodian.

About First Samuel

First Samuel is one of Australia's leading private client wealth management companies. Since 1999 it has provided an integrated and highly client focused service of strategic advice, individual and direct investment and comprehensive administration and reporting to Australian high worth individuals and their families, family offices, charities and not-for-profit organisations.

About SS&C Technologies

SS&C is a global provider of investment and financial software-enabled services and software focused exclusively on the global financial services industry. Founded in 1986, SS&C has its headquarters in Windsor, Connecticut and offices around the world. 5,000 financial services organizations, from the world's largest to local financial services organizations, manage and account for their investments using SS&C's products and services. These clients in the aggregate manage over $16 trillion in assets.

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

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The SS&C Technologies logo is available at http://www.globenewswire.com/newsroom/prs/?pkgid=8587

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