



# Sanlam Private Investments Streamlines Operations With SS&C's PORTIA

## South African Private Manager Goes Live on Investment Management Platform

WINDSOR, Conn., Nov. 15, 2012 (GLOBE NEWSWIRE) -- SS&C Technologies Holdings, Inc. (Nasdaq:SSNC), a global provider of financial services software and software-enabled services, today announced Sanlam Private Investments (SPI) has completed the implementation of SS&C's PORTIA, a leading middle-to-back office investment operations platform. SPI is the private client wealth management business within the Sanlam Group, one of sub-Saharan Africa's largest providers of financial services. Sanlam Private Investments commissioned the installation of PORTIA in 2011 and has been working closely with the SS&C PORTIA implementation team to facilitate and streamline many operational processes.

Sanlam Private Investments utilizes PORTIA functionality to create a more efficient operations solution. SPI chose PORTIA because of its global capabilities and its flexibility to meet local requirements. To achieve these goals, SPI implemented PORTIA to automate a number of processes from seamless importing of data to corporate action processing and customized tax withholding calculations and operational reporting.

"We were looking to automate as many manual processes as possible to create a more efficient operation that allows us to grow without interruption," said Liezl Myburgh, Head of Operations, Sanlam Private Investments. "The team of PORTIA professionals understood this goal and partnered with us to create a solution that will scale our business, improve internal capabilities and increase operational efficiency. We look forward to working with PORTIA in the coming years as our business continues to grow."

"We are pleased that Sanlam Private Investments successfully implemented PORTIA in partnership with our consulting team," said Christ Bremner, Senior Vice President and General Manager, SS&C PORTIA. "We welcome SPI into the PORTIA community and look forward to working with them and other firms in the region to provide solutions to address their unique operational challenges."

SS&C PORTIA provides a broad set of middle- to back-office capabilities that allow investment managers to track and manage the day-to-day activity in investment portfolios to support global accounting requirements. Offered on a deployed and hosted basis, the solution supports a wide range of functions including corporate action processing, internal reporting, client reporting, regulatory reporting, performance measurement and attribution and post trade compliance.

### About Sanlam Private Investments (SPI)

Sanlam Private Investments (SPI) is a private client wealth management business which engages on an individual basis with high net worth individuals and their families to design, deliver and personally manage bespoke investment solutions for both South African and international clients.

SPI provides a comprehensive and holistic suite of integrated wealth management services, including multi-asset class investment advice, stockbroking and portfolio management, fiduciary and tax services, a range of non-transactional banking services, and South Africa's first specialist art advisory service.

Established in 1999 and headquartered in Cape Town, the SPI team comprises 400 people across 23 international offices in South Africa, the UK, Switzerland and Australia, managing R120bn in assets under management and administration for 30,000 clients.

For more information, visit [www.sanlamprivateinvestments.co.za](http://www.sanlamprivateinvestments.co.za).

### 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. Some 5,500 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. These clients in the aggregate manage over \$26 trillion in assets.

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

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