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## **SS&C to Acquire Leading Advisor CRM Solution, Salentica**

Salentica brings next-generation client experience capabilities for advisors

WINDSOR, Conn., Oct. 24, 2016 /PRNewswire/ -- SS&C Technologies Holdings, Inc. (Nasdaq:SSNC), a global provider of financial services software and software-enabled services, today announced its acquisition of leading CRM solution Salentica.



Salentica will become a platform partner to the firm's Black Diamond<sup>®</sup> wealth platform and deepen integrations and support for other SS&C clients including APX, Axys, and Global Wealth Platform. The Salentica team brings deep expertise in providing integrated CRM solutions for both Microsoft Dynamics CRM and Salesforce CRM platforms. The company will operate as a business unit under SS&C and the acquisition will add 30 employees. With more than 5,000 users and an average firm size of over \$3 billion in assets, Salentica's clients include registered investment advisers (RIAs), broker-dealers, family offices, institutional wealth managers, and trust companies. The highly experienced leadership team, including President and Founder Bill Rourke, will remain in place. Under the new organization, Rourke reports to Dave Welling, Managing Director and Co-General Manager of SS&C Advent. Mr. Welling is responsible for leading SS&C's strategy in wealth management.

"Fundamentally this is an acquisition about adding deep expertise in CRM, a key component of the advisor technology ecosystem, and being able to bring that experience to large, complex advisory firms," said Mr. Welling. "We welcome Salentica's unparalleled knowledge and experience in wealth management CRM implementations to clients using the Black Diamond wealth platform and other SS&C solutions in a unique and meaningful way."

"We are excited to enter this next phase of our growth as part of SS&C and to deepen our already strong relationship with the SS&C team," said Bill Rourke, President and Founder of Salentica. "We found that we have a mutual commitment to supporting clients and how the combination of technology and service play a key role in their growth."

### **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 10,000 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](http://www.ssctech.com). Follow SS&C on Twitter, LinkedIn and Facebook. The SS&C Technologies logo is available at [www.globenewswire.com/newsroom/prs/?pkgid=8587](http://www.globenewswire.com/newsroom/prs/?pkgid=8587)

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