

## PRODUCT BRIEF

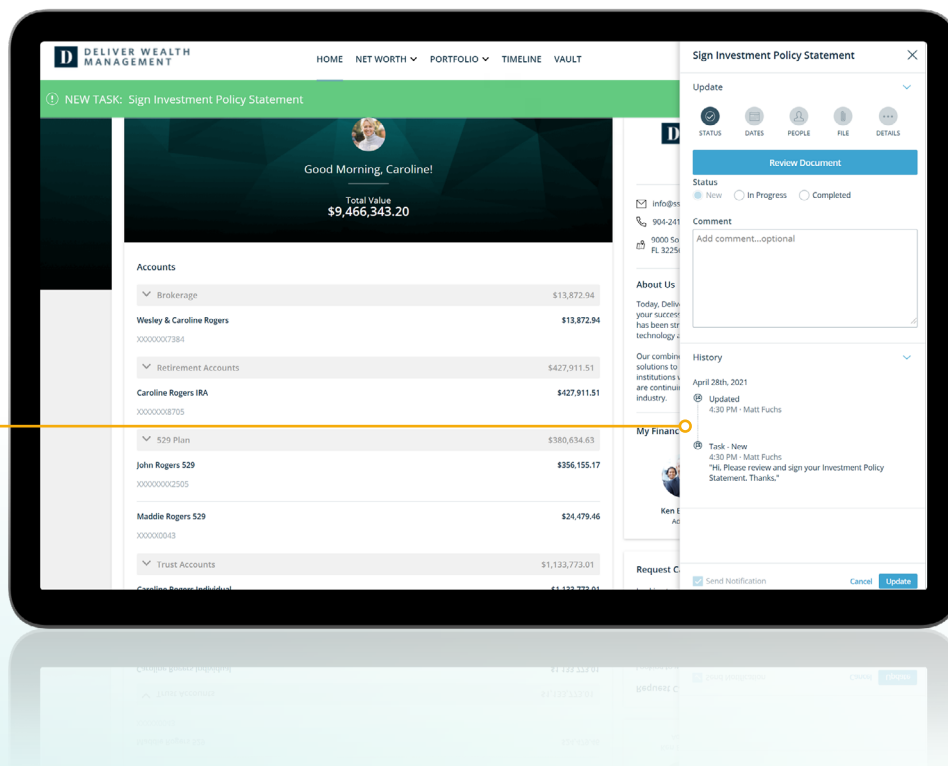
# eSignatures: Seamlessly Signed and Securely Stored

As the home of your day-to-day client communication and financial management needs, Black Diamond eases the document signing process through a smooth and effective integration with DocuSign®—the leading solution for eSignatures.

### A productive, timesaving workflow.

The world of wealth management has no shortage of documents requiring client signatures and a place for safekeeping. From within SS&C Black Diamond® Wealth Solutions, a simple workflow is the answer to streamlining the entire end-to-end process. The integrated wealth technology suite provides an easy way to request, track, and complete DocuSign® eSignatures along with automatic storage of the final document within Black Diamond's secure Vault.

The **Client Experience** portal features a **To-Do** list, which keeps track of outstanding signature requests and provides direct access for fulfillment.



\*DocuSign licensing not included as part of Black Diamond. Your firm must obtain a license directly through DocuSign.

## How it works.

When you are ready to initiate an eSignature request, you can choose to upload the file from your computer or select a previously established DocuSign template.

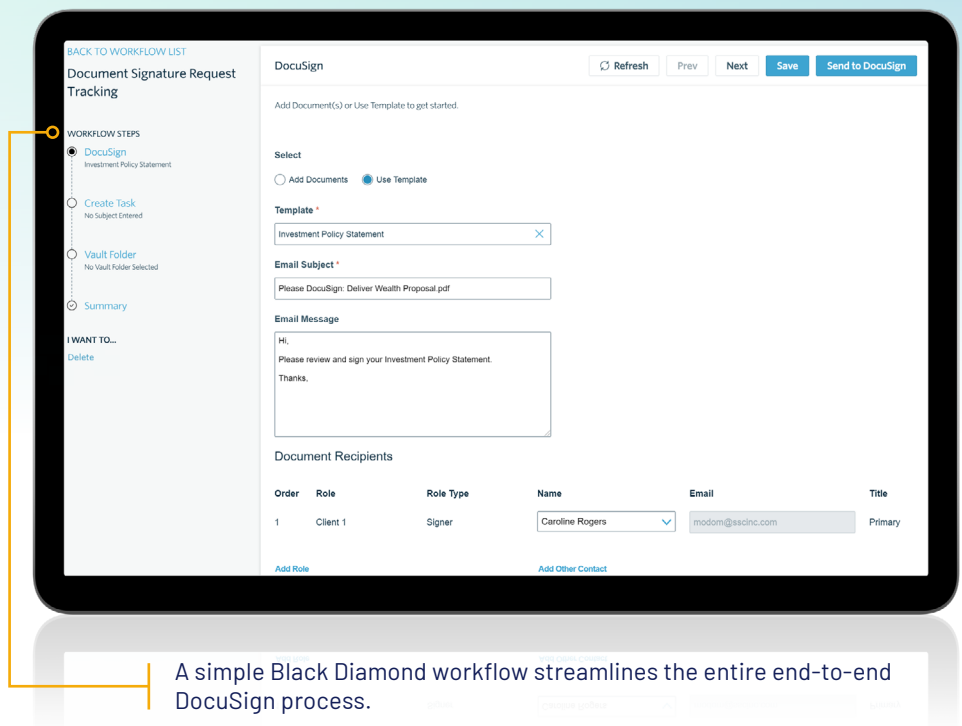
After preparing a personalized message, the client receives an immediate notification via email. Additionally, you can create a Task on the To-Do list within their Client Experience portal. An assigned due date, periodic reminders, and direct access for the client to fulfill the request help prompt action. The Task will also self-mark as completed and alert you when the client meets all signature requirements.

You also have the option to select a Black Diamond Vault folder for automatic storage of the document after all necessary signatures are completed. This creates access and organization of signed documents along with other pertinent client-related files, like custodial tax statements and reports, so you and your client can quickly find important materials. Vault folders have the flexibility to be private to you or shared with your client or other team members – efficiently meeting any oversight needs.

## Everyone benefits.

### Your clients gain:

- Visibility into outstanding signature requests within their Client Experience portal, no matter the device
- Immediate notification when new document signatures are requested
- Direct navigation to sign the document in DocuSign from within their Client Experience portal or the notification email
- Access to the final signed document within their portal's secure Vault



A simple Black Diamond workflow streamlines the entire end-to-end DocuSign process.

### You gain:

- Quick transmission of eSignature requests to all required signees associated with a relationship
- Efficient monitoring of all outstanding To-Do List Tasks related to DocuSign across all clients in Black Diamond
- Notification when a client updates a To-Do List Task or when all signature requirements are met
- Faster responses since clients receive system reminders to take action on outstanding requests
- Access to signed documents within the secure Vault with the ability to share the folder with clients and other team members

## About Black Diamond

SS&C Black Diamond® Wealth Solutions is the premier suite of technology and services built to simplify operations, strengthen client relationships, and support the long-term growth of wealth management firms. As

the centralized foundation for portfolio accounting, investment management, CRM, compliance, and client engagement, Black Diamond enables firms to streamline workflows and tailor their tech stack to meet evolving needs. Strategic integrations and a personalized service model provide the flexibility and support wealth managers need to scale with confidence.

## For More Information

To learn more about Black Diamond and the DocuSign integration, please contact your personal service representative, call 1-800-727-0605, or email [info@sscblackdiamond.com](mailto:info@sscblackdiamond.com).

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