

PRODUCT BRIEF

Powerful Integrations. Compelling Results.

Black Diamond and Schwab Advisor Services™ users enjoy intuitive workflows and the ease of moving between platforms.

Financial management firms of all sizes and types leverage the award-winning Black Diamond® Wealth Solutions to streamline operations, deliver business insights, and connect with both prospects and clients to build long-lasting relationships.

Black Diamond offers a fully-integrated cloud-native solution complete with performance reporting, portfolio rebalancing, an immersive client portal, and seamless connections to a vast ecosystem of smart integrations.

Proactive, personalized attention from a dedicated service team ensures advisors receive access to an elite combination of technology and service.

For mutual clients of both Black Diamond and Schwab, simplification is key to providing an elevated user experience. With integrations like Straight Through Trade Processing with FIX® and Black Diamond to SAC Single Sign-On, our clients enjoy an intuitive workflow along with the ability to seamlessly navigate between platforms.

Existing integrations between Black Diamond and Schwab Advisor Services provide advisors with:

- Black Diamond to SAC single sign-on
- Straight through trade processing via FIX
- Black Diamond to Schwab Alliance single sign-on
- Cost basis sync
- Custodian alerts
- Statements and tax documents
- Straight through management fee sync
- Service requests
- Digital account opening
- Change address
- Intraday data
- New account status
- Move money

Within Black Diamond, advisors leverage cutting-edge solutions that drive success, such as:

- Comprehensive portfolio management
- Customizable reporting
- Immersive Client Experience
- Next-generation Rebalancer
- Intuitive dashboards
- Robust Billing
- And much more

“To best serve the end investor, advisors need easy access to real-time account data and key financial documents from their custodian, as well as the ability to quickly execute trades. This is why we continue to work closely with the Schwab Advisor Services team to develop tight integrations that provide intuitive workflows and seamless access between our solutions.”

— Brian Justice
SVP, Senior Managing Director, Sales
SS&C Black Diamond

The Cornerstone of Your Business: One platform to support your unique needs.



“Black Diamond has built a robust set of integrations with Schwab that brings meaningful efficiencies to advisors.”

— **Allison Doohar**
Managing Director,
Head of AS Wealth Services and Platforms
Charles Schwab

For more information

If you have questions about any of the Schwab Advisor Center integrations, or would like to learn how SS&C Black Diamond Wealth Solutions can support your business, call Jenny Schuster at 1-415-601-3829 or jschuste@sscinc.com. You can also visit sscblackdiamond.com.

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