CRM SOLUTIONS

Black Diamond Edge

Power Your Practice with a Managed CRM Experience

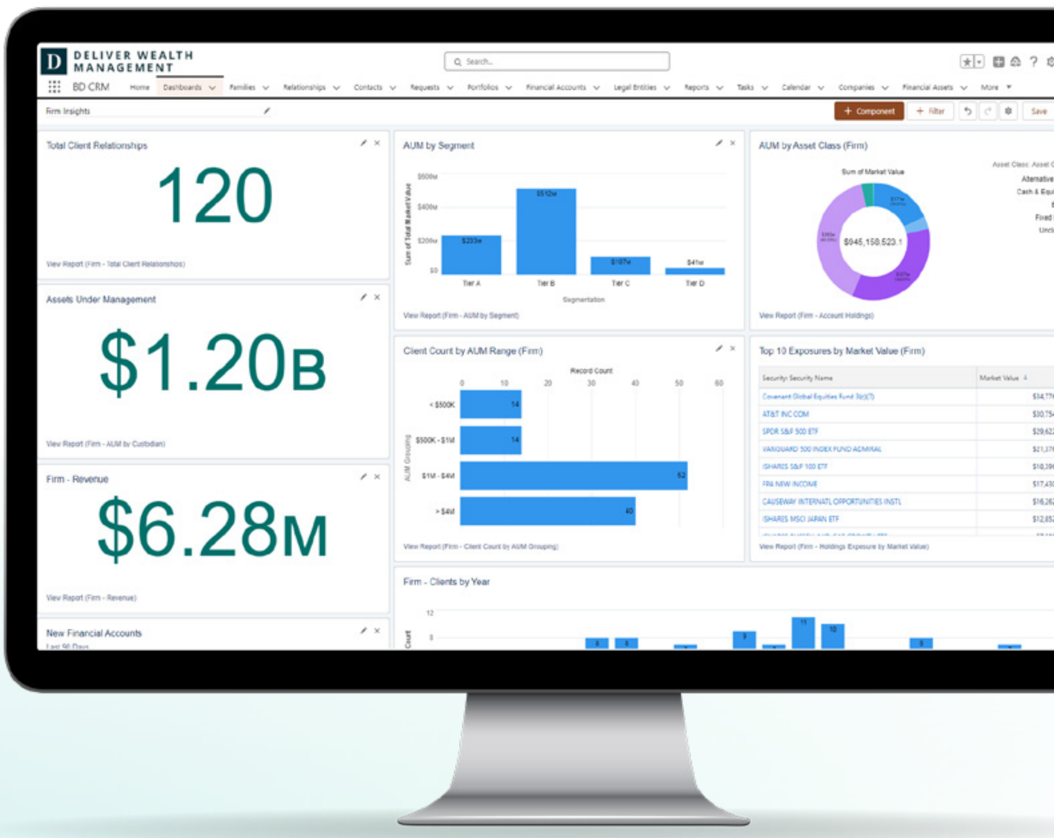
Wealth management is a relationship business. So, it's not surprising that, in our many conversations with advisors, you have told us that a CRM system is one of the most critical components of your technology stack. That is why we introduced Black Diamond Edge, a managed CRM experience exclusively for Black Diamond users.

Insights That Drive Action

With clients expecting a more personalized experience with a comprehensive view of their financial lives, you must take advantage of technology that can give you an edge. By combining the agility of Black Diamond with the connectivity of the Edge CRM, you can streamline your operations and be better equipped to provide your clients with the best financial guidance.

Black Diamond Edge can help you to:

- Free up time to focus on your business by letting the Black Diamond team operate as the outsourced administration for your CRM
- Use financial account and portfolio data to segment clients and create client service levels for next-best-action recommendations
- Create and sync households and contacts from from Edge to Black Diamond reporting
- Track and manage prospective clients and easily onboard them when they close
- Improve efficiency by using Black Diamond data to trigger operational CRM workflows



sscblackdiamond.com | info@sscblackdiamond.com | 1-800-727-0605

Efficiency Meets Excellence

Black Diamond Edge leverages unique-to-SS&C features to drive productivity, create efficiencies, and improve client service, including:

Client segmentation and interaction insights: Empowering advisors to engage with clients at the right moment, tracking and creating last and next client touchpoints, including emails, calls, and client review activities.

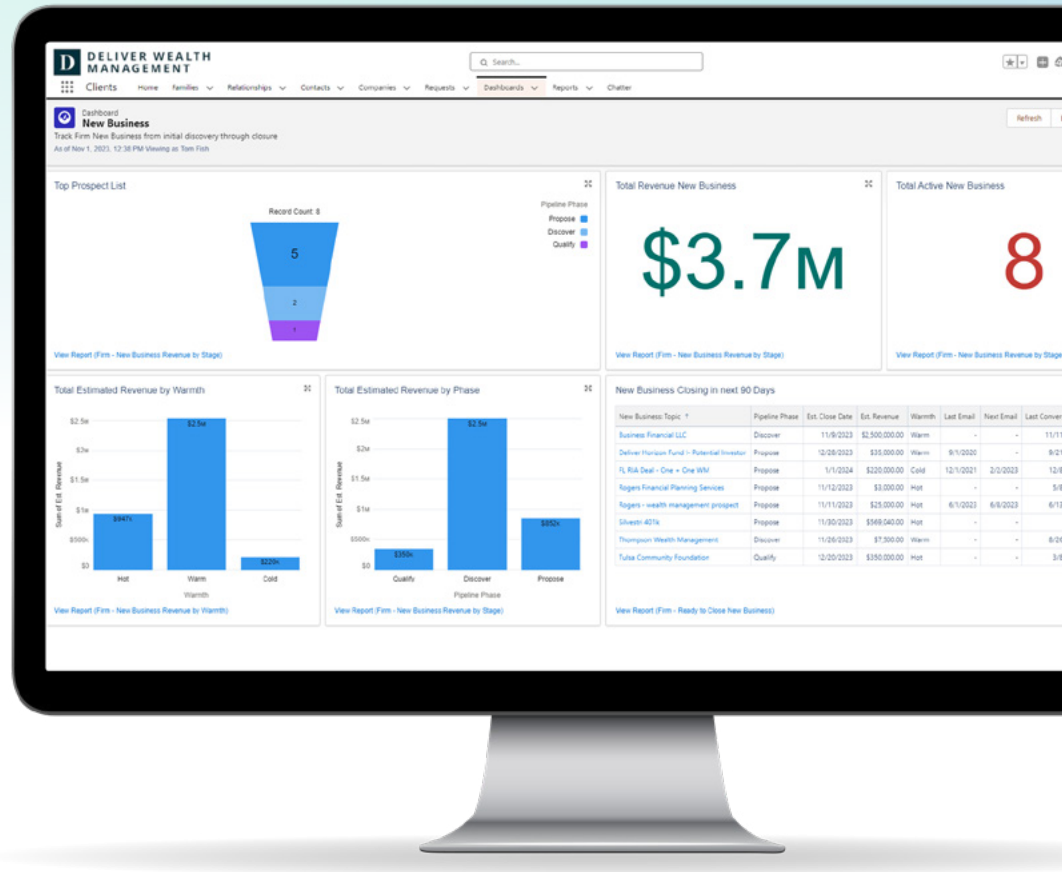
Account opening: Supporting single and multi-custodial workflows, account opening integrations save advisors time and enable them to deliver a better client experience.

Monitor and control client service efforts: Enabling advisors to gain insights into time and resource allocations, facilitating assessment of the investment in client relationships, all with automated efficiency and profitability tracking.

Operational workflow and activity management: A comprehensive module streamlining and automating business processes efficiently through dynamic templates, approvals, checklists, and task management orchestration.

Robust email integration: A native in-email app that bridges the gap between CRM and major email solutions, such as Outlook and Gmail, eliminating manual data transfers and synchronizing contacts, events, and tasks.

Pre-built Integrations: Access to a curated catalog of custodial and advisor technology integrations, simplifying and automating the tech stack with support from Black Diamond's Edge experts.



For more information

If you want to learn how SS&C Black Diamond® Wealth Solutions can support your unique advisory firm, please call 1-800-727-0605 or email info@sscblackdiamond.com. You can also visit sscblackdiamond.com.