

PLATFORM PARTNER

# Morningstar Direct Advisory Suite

Infuse SS&C Black Diamond® Wealth Solutions' reconciliation and reporting engines with Morningstar's research and proposal tools for more intelligent client engagement.

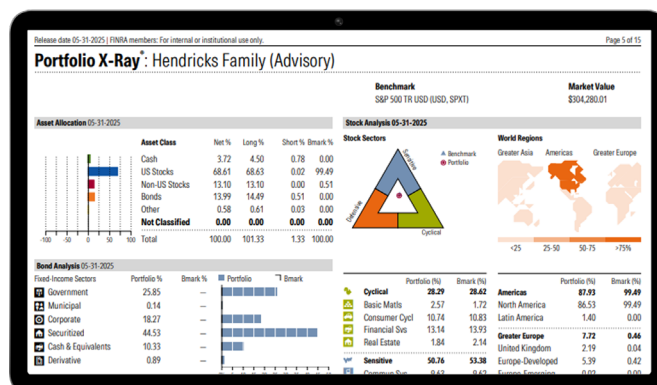
In today's fast-paced markets, clients expect more than just data; they want clarity, confidence, and a connection. SS&C Black Diamond Wealth Solutions is the only wealth platform integrated with Morningstar's Direct Advisory Suite, empowering you to deliver all three.

Designed to enhance every stage of the advisor-client journey, Direct Advisory Suite unites research, planning, and reporting capabilities to help drive investor success with confidence.

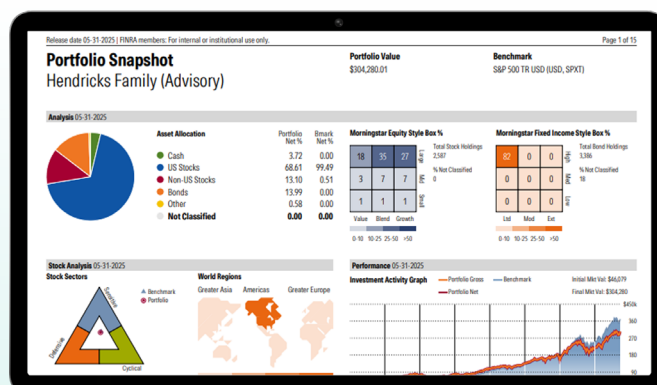
Whether you're conducting due diligence, building proposals, or guiding portfolio discussions, Direct Advisory Suite helps advisors build investor trust.

## Conduct Global Research & Market Monitoring with Confidence

- Access Morningstar's independent ratings and global data across asset classes
- Use customizable charting tools to visualize complex information and uncover insights
- Get instant answers and relevant resources with Mo, Morningstar's AI-powered assistant



Visualize asset allocation, sector weightings, and portfolio diversification with Morningstar's Portfolio X-Ray report.



Support client meetings with clean, concise portfolio overviews built on trusted Morningstar data.

## Plan with Purpose Using Risk-Aligned Workflows

- Use the industry's most validated risk tolerance questionnaire to align clients with suitable investment strategies
- Easily map recommendations to client risk profiles and generate tailored, compliant proposals
- Optimize proposals in just a few clicks, combining research, scoring, and risk tools in one streamlined process

## Analyze and Compare Portfolios Visually

- Break down asset allocation, risk exposure, and performance metrics at a glance
- Compare client portfolios to benchmarks or models to reveal areas of improvement
- Run side-by-side scenarios and visualize the impact of allocation changes in real-time

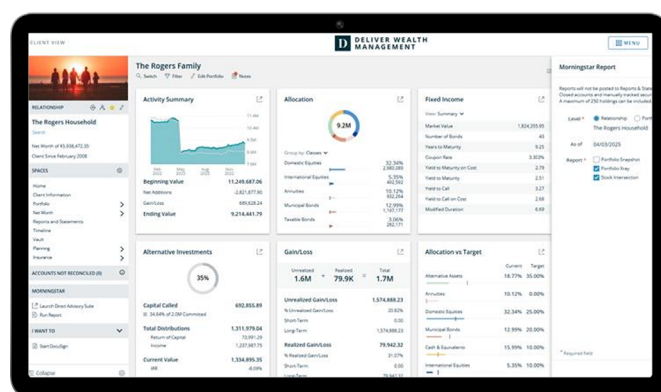
## Deliver Client-Ready, FINRA-Reviewed Reports

- Choose from more than 10 prebuilt, FINRA-reviewed reports that are client-friendly and visually intuitive
- Support every phase of the client journey, from onboarding to review meetings, with consistent, high-quality outputs

## End-to-End Advice You Can Trust

The integration unites two trusted platforms into a robust ecosystem that empowers advisors to deliver smarter, faster, and more personalized client experiences.

Built on a foundation of daily reconciliation, robust data processing, and modern client engagement tools, Black Diamond supports your entire advisory lifecycle, whether you're a growing RIA, a multi-generational family office, or a trust institution. With Black Diamond, firms are empowered to leverage a solution that delivers.



Built for efficiency: Morningstar reports and recommendations delivered through your existing Black Diamond workflow.

## Key Integration Features

This integration isn't just about connectivity; it's about accuracy, efficiency, and peace of mind. With clean, reconciled data flowing directly between systems, advisors save time, reduce manual errors, and deliver more confident recommendations.

- **Seamless Single Sign-On from Black Diamond.** Access Morningstar tools instantly without managing multiple logins, saving time and streamlining daily workflows.
- **Reconciled client data flows directly from Black Diamond into the Direct Advisory Suite.** Eliminate manual entry and reduce the risk of errors.
- **Run Morningstar Reports (Portfolio Snapshot, X-Ray, Stock Intersection) within Black Diamond.** Ensure proposals reflect up-to-date, validated account data.

Together, SS&C Black Diamond Wealth Solutions and Morningstar's Direct Advisory Suite form an integrated experience that improves data integrity, supports scalable growth, and reinforces the advisor's role as a trusted partner in every financial conversation.

## Data Accuracy That Drives Confident Advice

- Supports millions of accounts with institutional-grade accuracy
- Streamlines data normalization across held-away, traditional, and alternative assets
- Enables timely decision-making with daily performance updates and insight-ready data

## Robust Reporting and Flexible Insights

- Access client-level and firm-level performance dashboards
- Create branded, customizable reports tailored to investor needs
- Deliver investment narratives visually through interactive charts and comparisons
- Leverage role-based dashboards for advisors, operations teams, and executives

## Unified Views of Complex Portfolios

- Aggregate data across banking, brokerage, insurance, and alternative sources
- Provide clients with a comprehensive view of net worth and asset allocation
- Integrate seamlessly with leading custodians and back-office systems

## Why It Matters

With Black Diamond and the Direct Advisory Suite, your practice isn't just keeping up; it's moving forward. By leveraging Black Diamond's accurate, daily reconciled data as the foundation and pairing it with Morningstar's risk, planning, and proposal tools, you can:

- **Start with trusted data:** Black Diamond's reconciliation engine ensures portfolio accuracy across all accounts, including held-away assets, without manual clean-up.
- **Align advice with client goals:** Leverage Morningstar's validated risk profiling and portfolio scoring tools to inform your approach.
- **Generate personalized proposals:** Feed reconciled performance data into Morningstar's planning tools for real-time, tailored recommendations.
- **Create impactful client reports:** Deliver personalized, compliant presentations that build confidence and trust.
- **Streamline your day:** Eliminate platform hopping with a connected workflow that saves time, boosts productivity, and reduces errors.



## For more information

See the power of connected growth. Let us show you how to unify data and insight for more confident, efficient advice. To learn more, please call 1-800-727-0605, email [info@sscblackdiamond.com](mailto:info@sscblackdiamond.com), or visit our website.

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