

Advent Insurance Marketplace

Powered by DPL Financial Partners

Access commission-free insurance and annuities to grow your practice and deliver greater client benefits—right from your desktop.

In the past, high commissions, complex products, and lack of technology prevented fiduciaries from incorporating the benefits of insurance into their clients' financial plans. The Advent Insurance Marketplace Powered by DPL eliminates those barriers by offering value-driven products without commissions to deliver greater client benefits at a lower cost.

- Repurpose legacy annuities to improve client outcomes in financial plan
- Bring held away assets under your fiduciary management
- Provide protection from unexpected health events
- Mitigate risk in the portfolio
- Deliver guaranteed lifetime income
- Potentially improve fixed income returns without assuming additional market risk

Partner with the market leader

SS&C Advent has partnered with DPL Financial Partners to make this ground-breaking solution available. DPL operates the market-leading commission-free insurance platform, providing access to a wide range of insurance and annuity products from trusted carriers.

DPL's team of licensed insurance consultants facilitates policy issues on your clients' behalf. As your client's advisor, you will manage the account like any other advisory asset through your SS&C Advent portfolio management and accounting platform.

Direct access

The Advent Insurance Marketplace gives you direct access to no-load insurance products. Discover, evaluate, and purchase:

- Annuities
- Life and disability insurance
- Long-term personal care solutions

Maintain your fiduciary responsibilities

The Advent Insurance Marketplace removes fiduciary conflict by offering commission-free products and the education and

supporting tools you need to use them. Your clients benefit from products selected in their best interest and you can bill on them as you would any other investment in the portfolio.

Seamlessly integrated with SS&C Advent platforms

DPL's insurance technology integrates with SS&C Advent's advisory portfolio management and accounting solutions, including Black Diamond Wealth Platform, Advent AXYS, and Advent APX. Advisors can also leverage the Advent Custodial Data feed to access enhanced insurance reporting. This integration allows you to share with your clients a complete financial picture with a full reconciliation of accounts, including position and transaction data, fee calculations and robust reporting.

Contact Us

For more information on the Advent Insurance Marketplace and what it can mean for you and your clients, contact the Advent Insurance Marketplace Consulting Team at 1-888-680-0830 or email us at AIM@dplfp.com.