

PRODUCT BRIEF

Designed for Relationship-Driven Advisors.

Setting a New Standard in Service-Driven Technology.

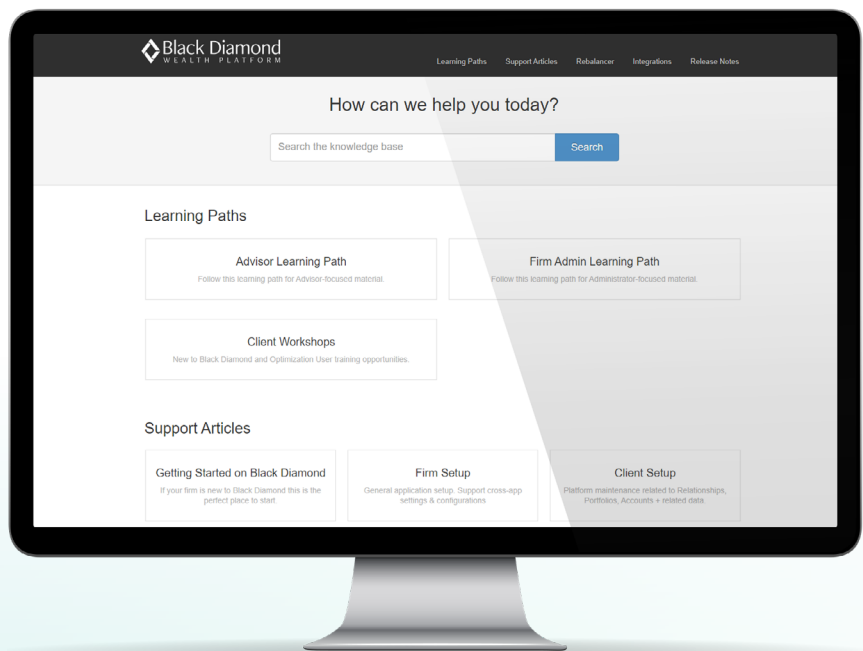
At SS&C Black Diamond® Wealth Solutions, we deliver more than just powerful technology—we provide a service experience that acts as an extension of your team. Our dedicated professionals bring deep expertise and proactive guidance to help you maximize every feature. With a true partnership model, we ensure that your firm has the tools, training, and support it needs to thrive.

We take service seriously.

Your experience begins with a dedicated implementation team that works alongside you to streamline every step of your platform migration. From data conversion and custom reports to client portal setup and more, the Black Diamond implementation team ensures your configuration is tailored to support your business goals from day one.

High-tech meets high-touch.

The seamlessly integrated Case Management tool enables you to submit a secure support request directly to your service team at your point of need. From there, you experience true transparency through prompt status updates and direct communication. No matter if you need data research, custom reports, or anything in between, you get personalized support when you need it.



With Black Diamond Support Articles, you have access to a comprehensive knowledge base filled with documents and videos for on-demand support.

Optimizing your use of the platform.

To help you make advisor adoption simple and empower your firm to achieve true scalability, numerous resources are available to help you maximize your use of the platform.

Virtual Workshops

An ongoing series of live online workshops covers various platform topics and is designed for different levels of expertise. Get hands-on experience with a curriculum that covers workflows, the latest platform updates, and best practices.

Training

A robust, two-day workshop in our Jacksonville office* allows you to dive deep into the system, meet one-on-one with your firm's service team, and network with your industry peers. We'll even credit you to attend.

Online Learn Articles

If you are looking for instant answers, Black Diamond is equipped with a Contextual Support tool that delivers relevant educational articles based on the area of the platform you are using. Additionally, you can access the comprehensive knowledge base to search for any topic of interest. It includes detailed information on platform functionality, enhancement releases, recorded webinars, integrations, and more, all available on demand.

*Subject to availability

The screenshot displays the 'Case Management' interface. On the left, there's a sidebar with a 'View All Firm Cases' checkbox and a 'New Case' button. Below this is a search bar and a status filter showing 'NEW' (2), 'WORKING' (1), 'REVIEW' (0), and 'CLOSED' (9). A table lists cases with columns for 'Subject/Submitter' and 'Last Updated', showing 'Account Recon Request' and 'General Inquiry'. The main area features a detailed view for 'Case #4703157', including submission details, a description, 'File Attachments' (two PDFs), and a 'Case Team' section with a search bar and listed members 'Joey Marchy' and 'Adam Anker'. A 'Comments' section on the right shows a comment from 'Sarah A.'.

Keep track of all support requests through the built-in Case Management tool.

Your voice matters.

As a technology-enabled service organization, your input makes a difference. By voicing your ideas and feedback, the enhancement roadmap evolves to meet your needs and to stay ahead of market trends.

Client Satisfaction Survey

Each year, you will receive a request to provide your candid opinion on Black Diamond's service and technology. The team reviews all feedback directly, identifies key trends, and shares insights across the Black Diamond organization to drive meaningful improvements.

Great Ideas

Using the Great Ideas feature, you can submit enhancement requests directly within the platform. These ideas are directly passed on to the product

development team, which tracks themes and makes improvements in response to the submitted suggestions—your input matters. With hundreds of advisor-driven Great Ideas implemented year after year, your

For more information

The unlimited, proactive, and high-touch Black Diamond service model breaks the mold and stands out as a key differentiator.

Contact us today to learn how SS&C Black Diamond Wealth Solutions can support your business:

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