

CASE STUDY

The Decker Wealth Management Story

Mathematically Informed Decisions

Decker Wealth Management draws on more than 165 years of experience among its professionals, utilizing technology and research found within the largest firms on Wall Street to provide clients with intelligent, practical, and unbiased advice. They are dedicated to prioritizing their client's interests first.

Founded by William Decker in 2009 after 15+ years as a senior wealth advisor at Morgan Stanley and US Trust/Bank of America, Decker Wealth Management began as a start-up RIA. "Before we had any clients onboarded, we were already clients of SS&C Black Diamond® Wealth Solutions," he says with a smile. "When we opened our doors, we reviewed all of the industry-leading platforms and went with Black Diamond as it clearly was a differentiator for how we wanted to run our business."

Decker points out, "Client investment decisions are mathematically informed; everything to us is a math question. We are not a story shop, so having a comprehensive portfolio management and performance reporting system is

critical for managing our portfolios and communicating our process to clients and prospects."

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Founder and President
Decker Wealth Management

As part of his philosophy, Decker signifies how growing up in Silicon Valley and later recognizing his clients as tech-savvy, he decided his wealth management firm would be technology focused. "From day one, we wanted to demonstrate to our clients that we had the same, if not better, technology than the big institutional firms so clients would have confidence in our approach."

Profile

Client: Decker Wealth Management

Location: Nashville, TN

Description: Financial planning and wealth management firm

AUM: \$500 million

Implementation Year: 2009

Background

- Founded as an independent RIA start-up after a long career at various Wall Street firms
- Technology savvy firm focused on using mathematics to inform portfolio construction and management
- Provides discretionary asset management using individual securities and ETFs to diversify portfolios

Decker states that while they do not sell performance, they rely on the many facets of the performance reporting capabilities that the solution provides. “Black Diamond provides instant feedback on our portfolios as to what is working, what needs addressing, and ways to be more efficient in managing our client portfolios.”

Additionally, Decker appreciates the ability to customize Decker Wealth Management’s reporting for clients. “We love that we can engineer the reports how we want them and control how assets are classified. For example, being able to categorize REITs as equities or as an alternative asset. That choice is up to us and not hard-coded like statements from the custodians.”

To Decker, optics are essential. “We use Black Diamond to demonstrate to prospective clients how we will show their portfolios with the latest data. We often use Black Diamond in our prospect meetings and show the platform on zoom calls, which ultimately saves us time preparing decks as it is an effective communications tool.”

Decker’s clients also love the Black Diamond mobile app. “The mobile app is a great service, particularly for clients interested in the details of their portfolios,” he says. “They can immediately view that detailed information when needed, saving them valuable time.”

In these volatile market times, Decker points out that Black Diamond provides value for his firm and clients. “Black Diamond helps us stay on top of our job and also helps us manage client expectations as we can easily communicate the benefits of staying invested.”

Ultimately, Decker appreciates his firm’s significant relationship with SS&C. “They’ve been a key contributor and partner for the whole life of the firm, and we look forward to working closely together as we grow the business.”

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Benefits

- + Launched a technology experience better than the largest institutions
- + Enabled the firm to stay on top of and efficiently manage portfolios
- + Enhanced the client experience through the mobile app and Client Experience Portal

To learn more about Decker Wealth Management, please visit their website at deckerwealth.com.

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