

PLATFORM PARTNER

# Easily Manage Held-Away 401(k) Assets

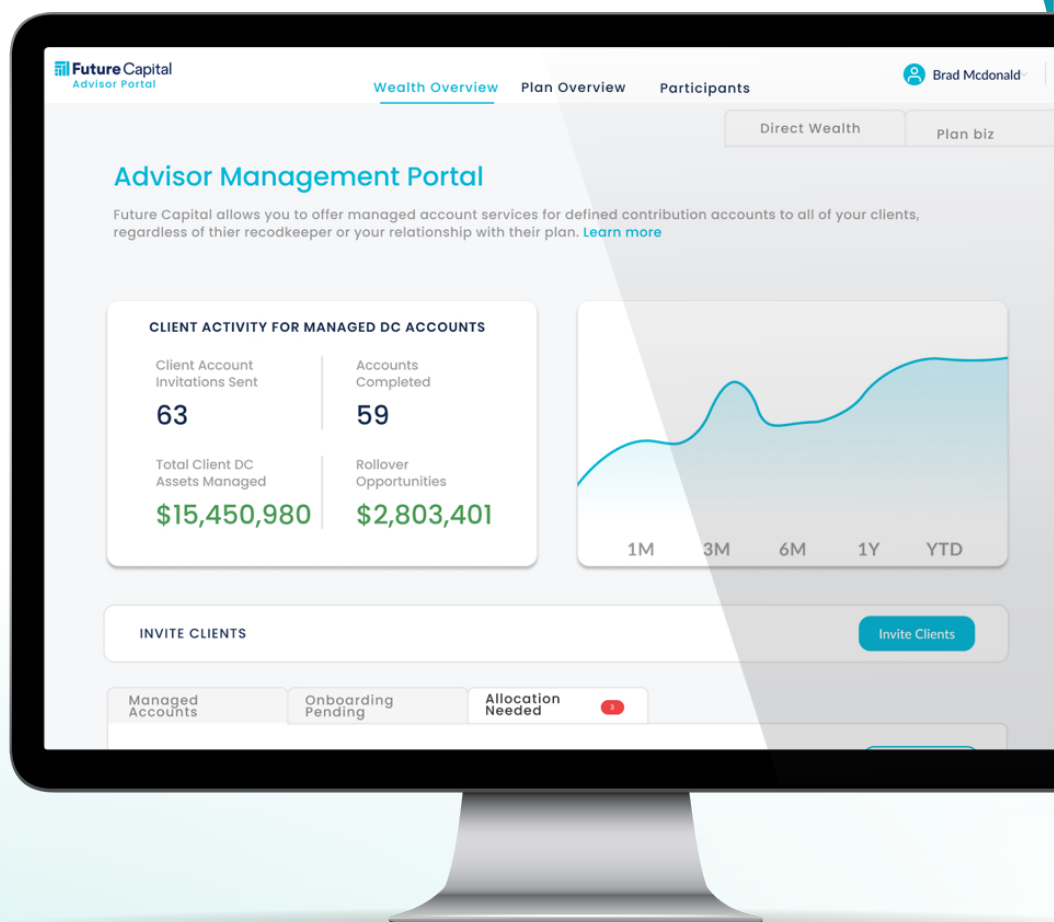
Expand your service offerings to unlock new revenue streams and capture a larger share of household wealth.

Most wealth management firms struggle to service held-away 401(k) assets due to limited data access, compliance restrictions, and time-consuming client coordination. SS&C Black Diamond® Wealth Solutions and Future Capital transform this challenge into an opportunity by streamlining how you see, manage, and report on these accounts.

Planning, setting goals, and monitoring workplace retirement accounts creates significant work for advisors. Future Capital streamlines these tasks, enabling you to seamlessly integrate 401(k) management into your clients' financial plans while maintaining exceptional service levels.

## Why Managing a Client's 401(k) Matters

The median American family holds most of their net worth in workplace retirement accounts. By managing these assets, advisors capture a larger share of household wealth while providing essential guidance for their clients' financial security.



Strong 401(k) management capabilities strengthen client relationships in multiple ways:

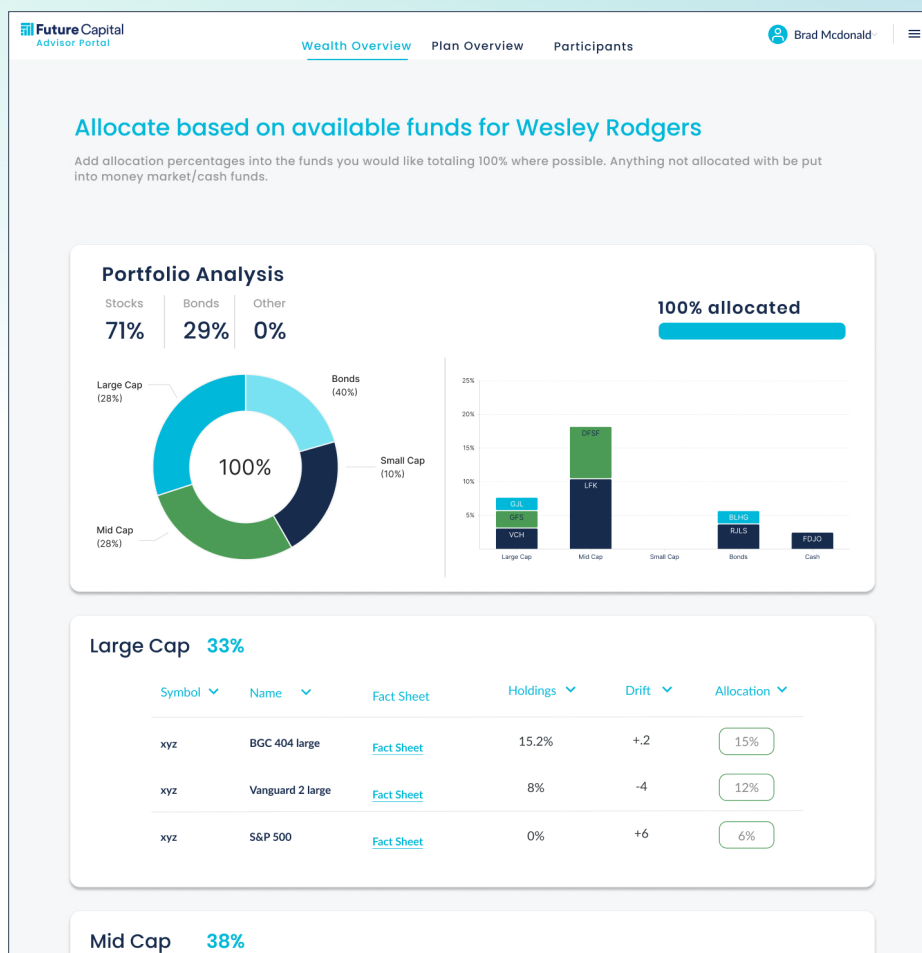
- Quickly generate new organic revenue
- Demonstrate commitment to clients' complete financial picture
- Deliver truly comprehensive planning services
- Differentiate your practice in a competitive market
- Generate opportunities for organic growth through rollovers
- Uncover additional financial needs across the household

A comprehensive wealth management approach helps attract new clients and deepen existing relationships. Regular oversight of 401(k) assets leads to better retirement outcomes while creating natural opportunities for customized solutions and expanded services.

## The Perks of Partnership

Future Capital and Black Diamond streamline 401(k) management, saving you time while reducing complexity. Partner with us to:

- Expand Your Reach:** Integrate 401(k) management with overall financial plans
- Capture Opportunities:** Access participation and termination data to proactively identify rollover opportunities
- Scale Efficiently:** Automate routine tasks while maintaining personalized service
- Access Expertise:** Leverage our retirement professionals for technical support and guidance



## The Future Capital and Black Diamond Advantage

- Trade held-away 401(k) accounts directly
- Generate household-level reporting seamlessly
- Bill on 401(k) assets through Black Diamond's Billing application
- Keep client credentials secure with no direct custody
- Access real-time data automatically

Connect with us to learn how SS&C Black Diamond Wealth Solutions can power your business strategy.

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