



PRODUCT BRIEF

Seamless Connections. Exceptional Outcomes.

Black Diamond and Raymond James' Advisor Access users enjoy intuitive workflows and the ease of moving between platforms.

Today, financial management firms of all sizes and types leverage the award-winning Black Diamond® Wealth Platform to streamline operations, deliver business insights, and connect with both prospects and clients to build long-lasting relationships.

Black Diamond offers a fully-integrated cloudnative solution complete with performance reporting, portfolio rebalancing, an immersive client portal, and seamless connections to a vast ecosystem of smart integrations. Proactive, personalized attention from a dedicated service team ensures advisors receive access to an elite combination of technology and service.

For mutual clients of both Black Diamond and Raymond James, simplification is key to providing an elevated user experience. With features like Straight Through Trade Processing with FIX® and Single Sign On from Black Diamond to Advisor Access, our clients enjoy an intuitive workflow and being able to easily navigate from Advisor Access to Black Diamond.

Existing integrations between Black Diamond and Advisor Access provide advisors with:

- Single Sign On from Black Diamond to Advisor Access
- Straight through trade processing via FIX
- Cost basis sync
- Synced custodial statements and tax documents

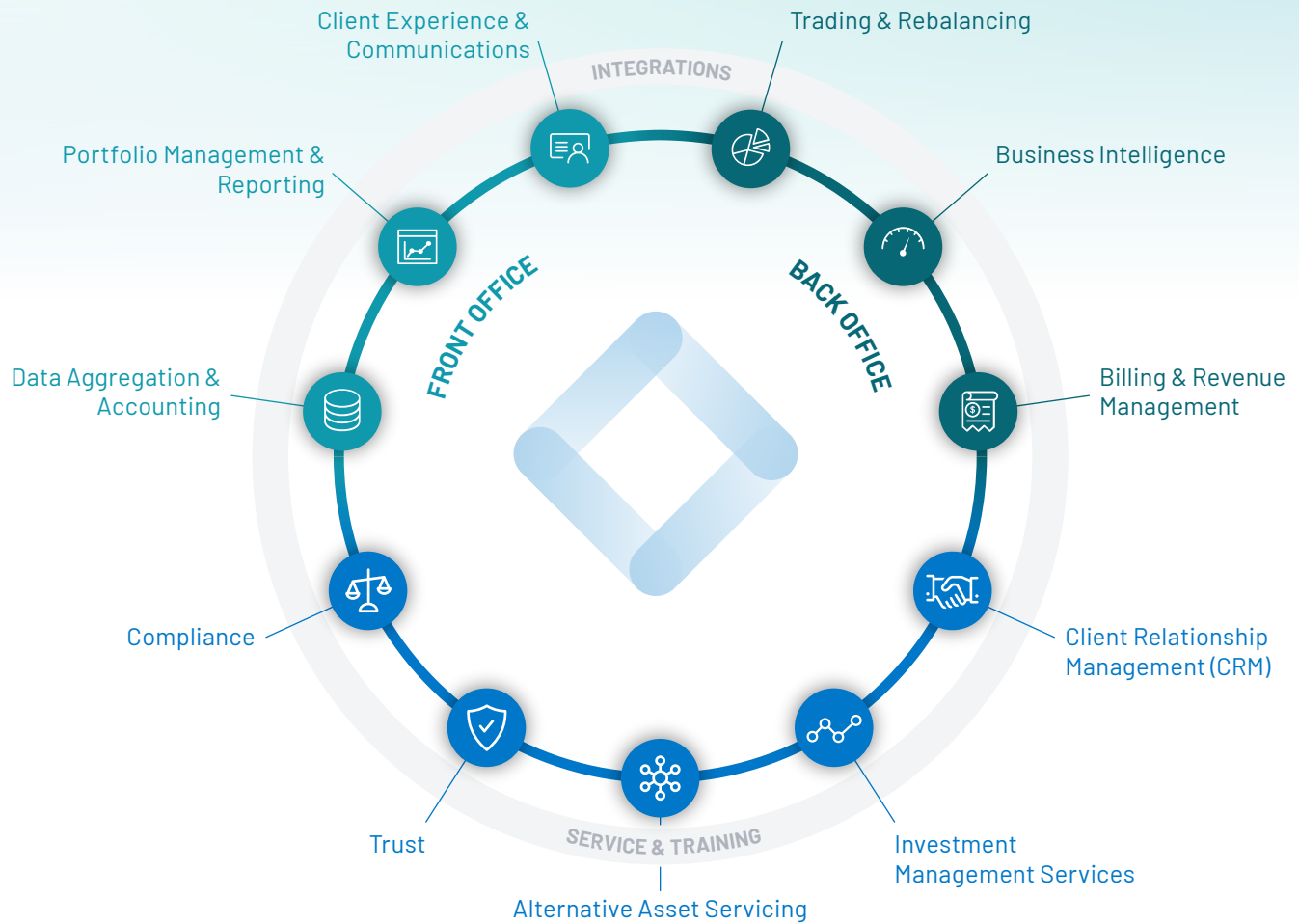
Within Black Diamond, advisors leverage cutting-edge solutions that drive success, such as:

- Comprehensive portfolio management
- Customizable reporting
- Immersive *Client Experience*
- Next-generation *Rebalancer*
- Intuitive dashboards
- Robust *Billing*
- And much more

“Advisors need fast, reliable access to real-time account data, essential financial documents, and efficient trading tools to deliver the highest level of service to their clients. That’s why we’re committed to deepening our integration with Raymond James—ensuring a seamless, intuitive experience that connects our technology with theirs.”

– Brian Justice, Vice President, Advisory Sales, SS&C Advent

At the Heart of Your Business: One platform to support your unique needs.



For more information

If you have questions about any of the Advisor Access integrations, or would like to learn how the Black Diamond Wealth Solutions can support your business, call Jenny Schuster at 1-415-601-3829 or jchuste@sscinc.com. You can also visit info@sscblackdiamond.com.

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