



CASE STUDY

Nadler Financial Group, Inc.

Moving from legacy software to a solution built for growth.

Founded in 1999, Nadler Financial Group, Inc. has grown into a nearly \$3 billion independent registered investment advisor (RIA), serving over 1,000 clients through two business lines: comprehensive wealth management and retirement plan services. Internally, the firm distinguishes itself by rewarding all team members based on the firm's overall success, fostering a collaborative culture in which advisors work together across specializations.

Meg Di Giulio, Chief Operating Officer, joined in January 2019 when Nadler managed approximately \$788 million in AUM. In seven years, the firm has nearly tripled in size, requiring its technology to evolve accordingly.

A Deliberate Search for the Right Partner

For years, Nadler used a legacy portfolio management platform. After that platform was sold in an acquisition, the firm selected another legacy solution, which did not meet expectations.

"We had a really challenging experience. The customization options were extensive but very difficult to implement because quality control was inconsistent and we

ran into software compatibility issues we hadn't anticipated," said Di Giulio.

The most significant issue was not operational friction or manual workarounds, but the loss of confidence in the output. They were never sure when a new system update would break something they had built. Nadler's team spent valuable time verifying numbers the platform should have managed, which was unsustainable for a firm with ambitious growth goals.

Before the contract ended, the Nadler team conducted a comprehensive evaluation of available platforms. SS&C Black Diamond® Wealth Solutions was selected after showcasing its advanced customization capabilities and a distinct support model. "We didn't come to Black Diamond because it was the easy choice. We went through a full evaluation. Black Diamond earned it by demonstrating that they'd genuinely

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— **Meg Di Giulio**
Chief Operating Officer
Nadler Financial Group, Inc.

Profile

- **Client:** Nadler Financial Group, Inc
- **Location:** Registered in AL, AZ, CA, CO, FL, GA, HI, IL, IN, MD, MI, MN, NJ, PA, TX and WI
- **Description:** Independent RIA serving 1,000+ clients across wealth management and retirement plan services
- **Combined AUM and AUA:** Approximately \$3B
- **Implementation Year:** 2024

Background

- Sought a technology partner capable of supporting rapid growth and scale across both wealth management and retirement plan business lines.
- Prioritized a solution that could deliver consistently reliable and accurate outputs to eliminate manual validation and restore confidence.
- Looked for a flexible, customizable platform backed by a strong support model that aligns with the firm's collaborative culture and independence.

grown their customization capabilities and that their approach to client support was meaningfully different,” noted Di Giulio.

During the evaluation, the Black Diamond team demonstrated strong engagement by focusing on Nadler’s dual business structure, collaborative culture, reporting needs for personalized client service, and their preference for a partner that supports the firm’s independence.

From Evaluation to Impact

The most immediate and meaningful result of moving to Black Diamond was the restoration of confidence in a reliable system, consequently giving the Nadler team back much-needed time in their day. According to Di Giulio, “The biggest change is that we know exactly what we are looking at when we see output from the system. That sounds basic, but it’s everything. When you can trust what the system is telling you, your team is freed up to do actual work instead of verifying whether a specific number is correct.”

In addition to improved system reliability, Black Diamond’s on-demand reporting and data mining tools have significantly reduced the manual effort required to generate client-specific outputs, benefiting the 28-person team serving over 1,000 clients. The platform has also

lessened the administrative burden on the Director of Data Management, supporting the firm’s risk management approach. Automated workflows now replace manual intervention, increasing operational capacity without the need to add staff.

Looking ahead, the firm views Black Diamond as a potential hub for improved technology integration across its retirement plan business. Di Giulio’s approach remains measured, focusing on proven capabilities and building on stable foundations.

“We’re not early adopters. We want to know something works before we commit. Black Diamond fits that approach because they’re a mature platform with a real support model. We’re not figuring things out on our own,” she notes. “They are a true partner to us. We searched for a partner who understood our needs and had the ability to move obstacles out of our way. We certainly found that partner in Black Diamond, and I’m glad we did.”

Growing from nearly \$788 million to nearly \$3 billion in combined AUM and AUA in seven years, Nadler Financial Group, Inc. has scaled through a period of significant change. Black Diamond now provides the reliable foundation Nadler needs to scale with confidence and support continued growth without overtaxing their team with manual work or compromising the client experience.

Benefits

- + Achieved restored confidence in a reliable system, enabling advisors to focus on client work instead of verifying individual numbers.
- + Realized greater operational efficiency through on-demand reporting, data mining, and automated workflows.
- + Gained a scalable, high-touch partnership model that supports continued growth without adding operational burden.

To learn more about Nadler Financial Group Inc., please visit their website at nadlerfinancial.com.

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