

# Powerful Integrations. Compelling Results.

## Black Diamond and Pershing's NetX360+ 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 cloud-native 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 Pershing, simplification is key to providing an elevated user experience. With features like Straight Through Trade Processing with FIX® and Single Sign On from NetX360+ to Black Diamond, our clients enjoy an intuitive workflow and being able to easily navigate from NetX360+ to Black Diamond.

### Existing integrations between Black Diamond and NetX360+ provide advisors with:

- Single Sign On from NetX360+ to Black Diamond
- Straight through trade processing via FIX
- Cost basis sync
- Synced custodial statements and tax documents

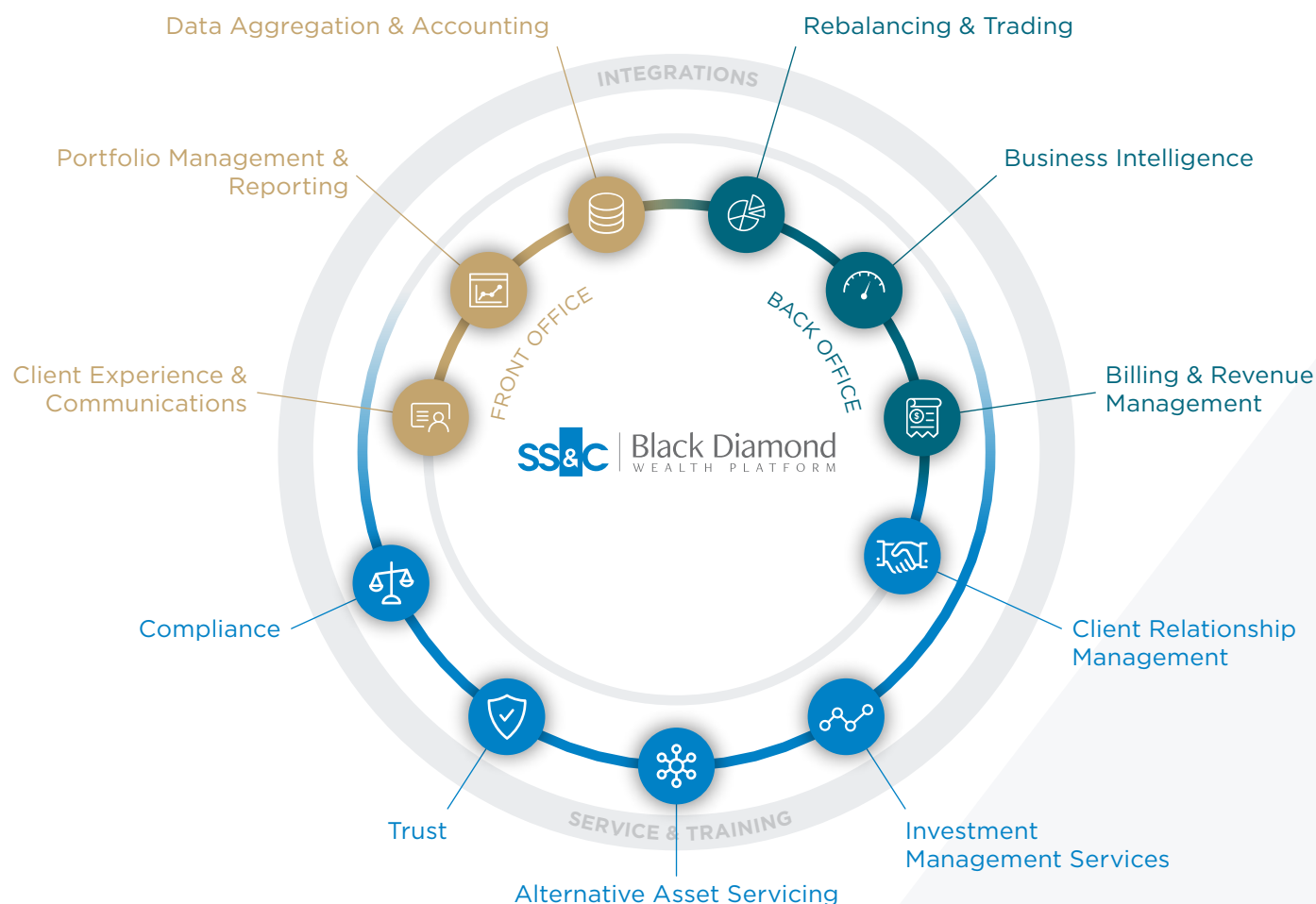
### Within Black Diamond, advisors leverage cutting-edge solutions that drive success, such as:

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

” We know that when it comes to technology, advisors are looking for an intuitive and highly efficient experience. Our integration with Black Diamond is part of our overarching goal of making technology frictionless and easy to use so advisors can focus on delivering value to their investors and scaling their business.

— Sudhir Tauro, Senior Director, Head of Strategic Relationships  
BNY Mellon | Pershing

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



#### FOR MORE INFORMATION

If you have questions about any of the NetX360+ integrations, or would like to learn how the Black Diamond Wealth Platform can support your business, call Jenny Schuster at 1-904-928-2716 or [jschuste@sscinc.com](mailto:jschuste@sscinc.com). You can also visit [blackdiamond.advent.com](https://blackdiamond.advent.com).

” To best serve the end investor, advisors need easy access to real-time account data and key financial documents from their custodian, as well as the ability to quickly execute trades. This is why we continue to work closely with the team at Pershing to develop tight integrations that provide intuitive workflows and seamless access between our solutions.

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

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