



## CASE STUDY

# Oakland Capital

## Building the right foundation for growth.

Oakland Capital is a single-family office established to consolidate and professionally manage a multi-generational family's financial affairs. From the outset, expectations included not only investment performance but also sophisticated reporting, transparency, and operational discipline across increasingly complex assets and relationships.

The family's financial ecosystem spanned multiple large financial institutions, custodians, fund administrators, and technology platforms. However, upon establishing the dedicated family office, Oakland Capital inherited a reporting infrastructure that could not support the complexity of family limited partnerships, alternative investments, and the increasing need for timely financial visibility across stakeholders.

### The Right Infrastructure

Chris Wong, CFO, was tasked with unifying the office's infrastructure. The team evaluated a range of platform options as it built its tech stack, initially considering solutions to manage all operations. However, these platforms often introduced additional implementation complexity, operational burden, and pricing structures that exceeded the organization's immediate needs. "We needed something that fit where we were, not where someone else thought we should be," Wong said.

Ultimately, Oakland Capital chose SS&C Black Diamond® Wealth Solutions for performance reporting and client portal functionality, paired with SS&C Family Office Services for partnership accounting. This tailored architecture from SS&C matched the firm's specific operational profile rather than a monolithic solution that required the family office to adapt to a one-size-fits-all offering.

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Chief Financial Officer, Oakland Capital

Some stakeholders initially preferred solutions with greater name recognition in the family office community. Despite this, Wong proceeded with SS&C, and the results have validated the decision.

### Turning Complexity into Visibility

Black Diamond was originally designed for performance reporting for registered investment advisors and was not historically known for supporting the complex needs of family offices, although SS&C's flexibility made that use case entirely achievable.

### Profile

**Client:** Oakland Capital

**Location:** Carson, California

**Description:** Single-family office managing complex assets, alternative investments, and partnership structures across multi-generational family environments

**AUM:** \$2B

**Implementation Year:** 2025

### Background

- Sought a scalable platform to support ongoing growth across its wealth management and retirement plan services.
- Prioritized improved reporting accuracy and data transparency while reducing manual validation processes.
- Valued operational flexibility and customization to align with the firm's independent, collaborative culture.

However, Wong was candid about the realities and challenges of navigating the implementation process for their sophisticated family office environment.

“There aren’t a lot of other family offices doing exactly what we’re doing with this platform combination,” Wong said. “We didn’t have a lot of peers to learn from. But the Black Diamond team remained engaged throughout the implementation process. That continuity mattered.”

SS&C Family Office Services managed reconciliation issues between the two systems, which proved essential during the early months. The integration required close coordination, and a dedicated Black Diamond contact provided Wong with consistent support throughout the transition.

Ultimately, the implementation successfully replaced delayed, spreadsheet-based reporting with a system that provides family members with real-time access to their financial information via a mobile or web portal. Currently, six primary family members have portal access through the Black Diamond interface. Some use the mobile app, while most prefer the web version. Feedback from these users has been consistently positive. In addition, the platform is able to provide tailored access to outside advisors as well, which makes coordinating with third-party advisors more efficient.

“Moving from delayed PDF reporting to a real-time portal experience has been a significant improvement for the family members who engage with the platform regularly,” Wong said. “It provides a level of visibility and accessibility they simply didn’t have before.”

## Positioned for Long-Term Growth

Going forward, the family office is evaluating how the solution can scale as additional partnerships and assets come under management. Built around the Black Diamond and SS&C Family Office Services ecosystem, the foundation is designed to support long-term operational growth while enhancing transparency for family members.

What began as an effort to modernize reporting workflows has evolved into a scalable framework that supports a more connected family office experience.

Wong believes this opportunity extends beyond Oakland Capital’s own operations. Having completed an implementation that few family offices have attempted, he sees potential to demonstrate what this solution combination can offer to organizations pursuing modernization. “We have built something here that others could benefit from,” Wong said. “There’s an opportunity to show other family offices what this combination can do, because there aren’t many who’ve done it the way we have.”

SS&C created an operating model designed to drive Oakland Capital’s continued growth and serve as a blueprint for family offices seeking transparency and long-term scalability.

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## Benefits

- + Chose a technology partner equipped to support long-term modernization and scalability.
- + Modernized reporting infrastructure for complex family office operations and partnership structures.
- + Replaced delayed, spreadsheet-based reporting with real-time portal access and improved visibility.
- + Created a scalable operational framework tailored to specific reporting and accounting requirements.
- + Improved transparency and accessibility for family stakeholders through web and mobile experiences.

Learn how SS&C Black Diamond Wealth Solutions can support your business.

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