

PRODUCT BRIEF

# SMartX Connects Advisors to a Complete Managed Account Ecosystem

Save time and scale by managing traditional, alternative, and index strategies in one account.

As firms increase their reliance on technology to support the evolving relationship between advisors and investors, SMartX delivers an integrated technology solution to drive productivity gains, grow independent channels, and facilitate the transition from commission-based to fee-based accounts. SMartX is a complete turnkey asset management platform that offers advisors unparalleled portfolio flexibility and customizable investment solutions to meet each investor's objectives.

The platform provides advisors access to traditional and alternative investment strategies as well as the ability to implement third-party and/or proprietary investment strategies through a Unified Managed Account (UMA). This provides investors with access to multiple investment strategies, leveraging the benefits of a UMA/Separately Managed Account (SMA) structure. It's the first UMA/SMA platform that provides advisors with access to institutional-quality managers across both traditional and alternative investment strategies, as well as individual securities, mutual funds, and ETFs, all in a single brokerage account.



## The perks of partnership

Our partnership enables financial advisors to leverage the combined power of both tools within an integrated technology suite. By leveraging Black Diamond reporting partnered with SMARtX's extensive platform, the combined solution delivers a managed account experience like no other.

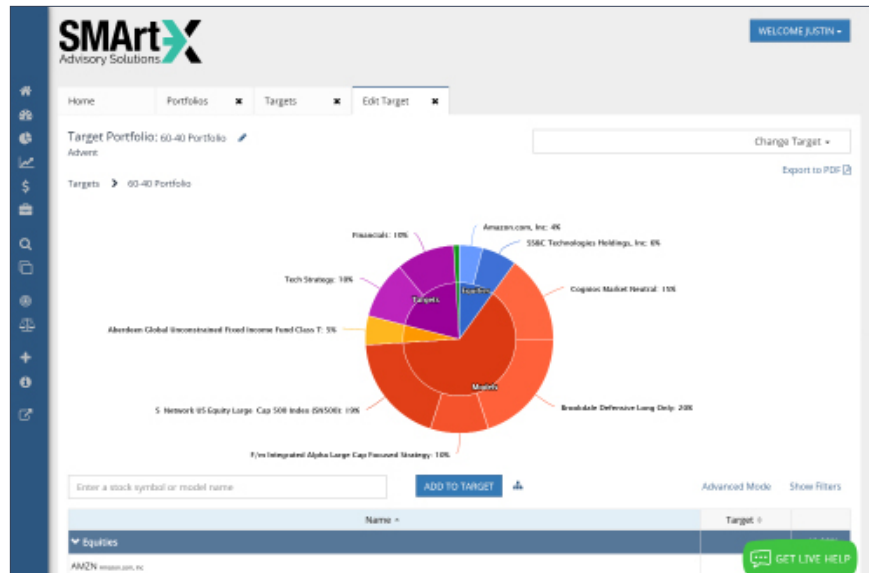
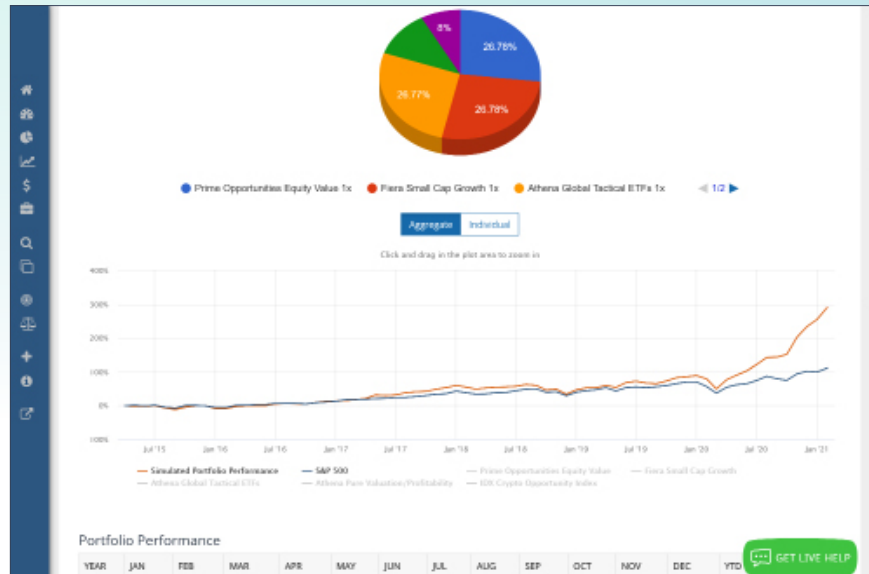
With SMARtX and Black Diamond, advisors can:

- Access SMARtX directly from Black Diamond
- Gain access to hundreds of investment managers and strategies
- Benefit from a complete investment ecosystem with SMARtX data seamlessly integrated into Black Diamond
- Generate Black Diamond reports showing sleeve-level data from SMARtX

## A purposeful suite of tools

With Black Diamond Wealth Solutions at the heart of your business, you can build an end-to-end, best practice technology stack, enabling you to manage your clients' complete wealth picture and deliver tech-powered services that exceed their expectations.

Black Diamond's innovative, cloud-based technology and services offer everything wealth management firms need to manage operations, engage clients and prospects, and drive sustainable growth.



## For more information

Connect with us to learn how the SS&C Black Diamond Wealth Solutions can power your business strategy by visiting [sscblackdiamond.com](https://sscblackdiamond.com), calling 1-800-727-0605, or emailing [info@sscblackdiamond.com](mailto:info@sscblackdiamond.com).

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