

PRODUCT BRIEF

Managed Account Services

Upscale your client experience with tech-enabled outsourced trading, tax and rebalancing with tax-aware optimization from within Black Diamond.

SS&C Black Diamond® Wealth Solutions Managed Accounts is an innovative service that empowers financial advisory firms to streamline their trading and portfolio management processes. By seamlessly integrating with Black Diamond via Rebalancer, this solution enhances portfolio management, increases efficiency, and unlocks new growth opportunities.

Managed Accounts Core Benefits

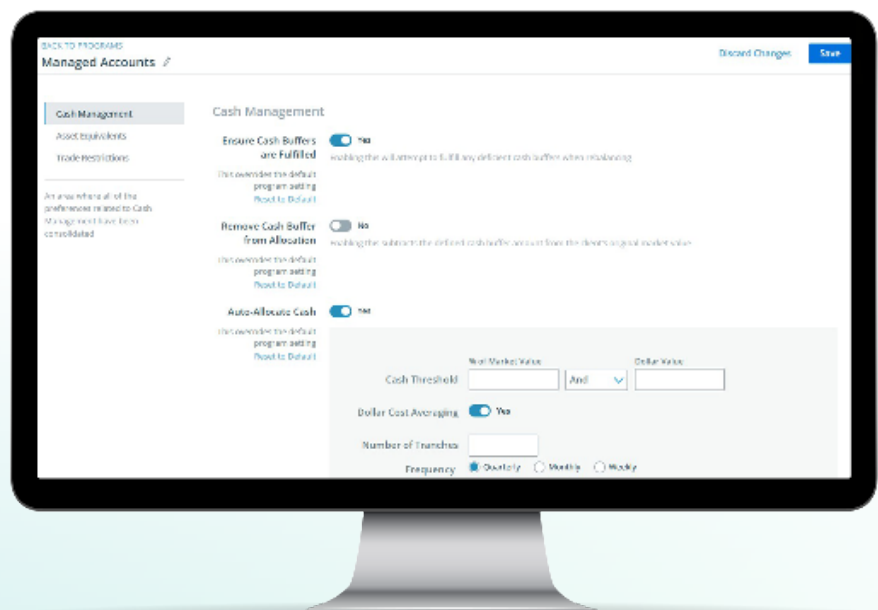
1. Personalized Model Portfolios

With Managed Accounts, firms can deliver customized portfolio solutions tailored to each client's unique objectives. This flexibility enables advisors to prioritize client goals and adjust portfolio risks, resulting in a highly personalized investment experience.

2. Thoughtful Automation

Managed Accounts introduces institutional quality automation to the portfolio management process, managing essential factors such as tolerance bands, cash buffers, and client-specific restrictions. These

automated processes are designed to optimize trade timing and minimize short-term capital gains while ensuring that cash management and tax-loss harvesting activities are synchronized, resulting in maximized operational efficiency.



3. Tax-Aware Optimization

For taxable investors, maximizing after-tax returns is critical, but navigating embedded gains and minimizing tax consequences during portfolio transitions can be challenging. Managed Accounts offers tax-aware features that consider portfolio risk, including tax-loss harvesting and asset location optimization, helping clients reduce their tax liabilities during transition and beyond. Additionally, Managed Accounts provides outsourced direct indexing capabilities, empowering advisors to offer even more personalized and tax-efficient investment solutions.

Why Black Diamond Managed Accounts?

Increase Efficiency & Profitability

Outsourcing routine trading and rebalancing allows firms to free up their operation teams to concentrate on value-added activities such as client prospecting, proposal generation, and paraplanning. This approach boosts operational efficiency and enhances profitability by enabling teams to focus on growth initiatives.

Scale Seamlessly

With Managed Accounts, firms can leverage the expertise of SS&C ALPS Advisors, gaining access to institutional-quality portfolio management without incurring substantial overhead. This scalable solution empowers fast-growing firms to efficiently manage complex portfolios, ensuring they can adapt to evolving needs.

Outsource Complex Trading

Whether your firm is seeking to outsource the entire trading process or manage small, complex accounts, Managed Accounts seamlessly integrates with the Black Diamond Rebalancer to provide a robust, automated solution. This service streamlines the management of multiple portfolios, corporate actions, and tax considerations allowing your team to focus on strategic initiatives rather than time-consuming manual processes.

Elevate and Scale Your Firm

Unlock the potential of customized investment solutions and streamlined portfolio management with Managed Accounts to elevate your firm and support sustainable growth. Utilize personalized model portfolios and advanced automation to boost client satisfaction and propel your business forward.

For more information

Request a personal demo today to learn more about how the Black Diamond Managed Accounts service can help your firm streamline operations, increase efficiency, and provide superior client service.

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We also invite you to learn more about our next-gen Rebalancer.

Click [here](#) to explore details about Rebalancer.