

PRODUCT BRIEF

Seamless Connectivity. Impressive Outcomes.

Black Diamond and Goldman Sachs Custody Solutions users value efficient workflows with smooth transitions between platforms.

Financial management firms of all sizes and types leverage award-winning SS&C Black Diamond® Wealth Solutions to streamline operations, deliver business insights, and connect with both prospects and clients to build long-lasting relationships.

Black Diamond offers a fully-integrated cloudnative set of solutions complete with performance reporting, portfolio rebalancing, an immersive client portal, a purpose-built CRM, on-platform model marketplace and proposal generation tools, and seamless connectivity 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.

Prioritizing simplification is a shared focus for Black Diamond and Goldman Sachs Custody Solutions as they aim to provide mutual clients with an elevated user experience. With features like Straight Through Trade Processing with FIX® and synced statements & tax documents, our clients enjoy an intuitive workflow and being able to easily navigate from Goldman Sachs Custody Solutions to Black Diamond.

Existing integrations between Black Diamond and Goldman Sachs Custody Solutions provide advisors with:

- Balances
- Straight through trade processing via FIX
- All orders sent as not held
- Access to high-touch trade desk
- Cost basis sync
- Synced custodial statements and tax documents
- Address information
- Positions
- Billing Export

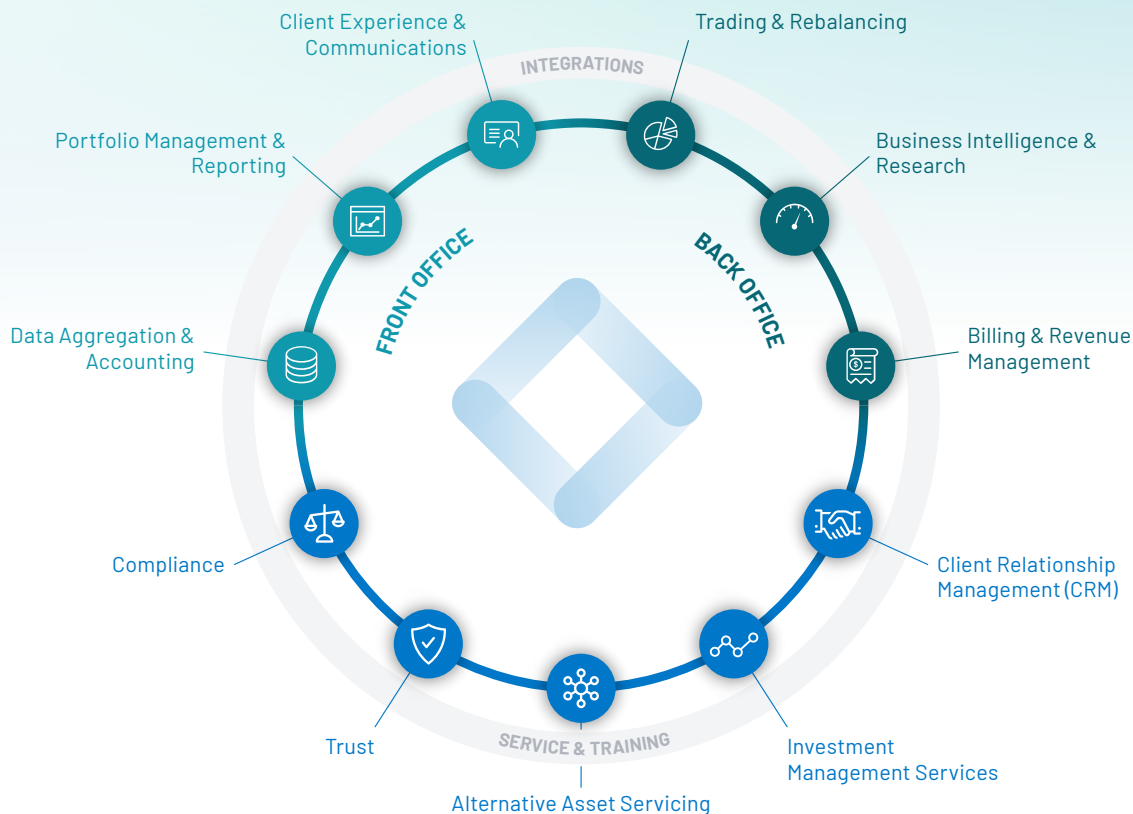
Within Black Diamond, advisors leverage cutting-edge solutions that drive success, such as:

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

“The paramount goal of providing the best service to the end investor demands that advisors have convenient access to real-time account data and crucial financial records from their custodian, coupled with the capability to execute trades swiftly. Our ongoing collaboration with the Goldman Sachs team is focused on creating seamless integrations that provide user-friendly workflows and seamless interaction across our solutions.”

— **Brian Justice**
SVP, Senior Managing Director, Sales
SS&C Black Diamond

The Cornerstone of Your Business: One platform to support your unique needs.



“We are excited to build integrations with digital forward firms like Black Diamond to help independent advisors elevate the client experience. Our combined modern technology capabilities enable the reduction of friction between the custodian and their technology providers.”

— **Craig Cintron**
Vice President, Global Banking and Markets
Goldman Sachs

For more information

If you have questions about any of the Goldman Sachs Custody Solutions integrations, or would like to learn how Black Diamond Wealth Solutions can support your business, call Jenny Schuster at 1-415-601-3829 or jschuste@sscinc.com. You can also visit sscblackdiamond.com.

About Goldman Sachs Advisor Solutions

Goldman Sachs Custody Solutions provides independent advisors brokerage and custody services.

Custody, clearing and certain brokerage services are offered by Folio Investments, Inc., which conducts business as Goldman Sachs Custody Solutions (GSCS). GSCS is an SEC-registered broker-dealer and Member FINRA/MSRB/SIPC. Neither this material nor any of its contents shall constitute an offer, solicitation, or advice to buy or sell securities.

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