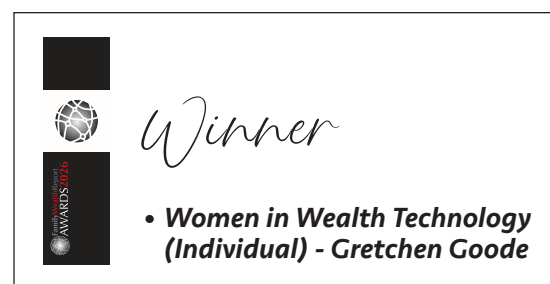


# Black Diamond | Leading Innovation in Trust Services



**Gretchen Goode**  
Senior Vice President, Consulting  
**SS&C Black Diamond® Wealth Solutions**



**S**SS&C Black Diamond® Wealth Solutions is a comprehensive suite of technology solutions and services for wealth management firms and trust companies. More than 3,300 firms, representing over \$4.3 trillion in AUM, rely on Black Diamond to manage operations, engage clients, and drive sustainable growth.

## What has been the most impactful innovation you introduced, and how has it shaped client outcomes?

The work on developing and launching Black Diamond Trust Services' suite of solutions focuses on how clients operate. Traditionally, trust companies haven't leveraged the same sophisticated front-office technology tools as the RIA space. SS&C saw an opportunity to move away from disconnected, siloed systems and build a unified, front-to-back trust solution. Black Diamond's suite of trust services brings together specialized tools, including an immersive client portal, advanced CRM capabilities, and dynamic reporting, to streamline operations, enhance client engagement, and support scalable growth through a configurable platform built specifically for trust organizations.

We advanced the idea through SS&C's innovative Tech Accelerator program, which was designed to create a channel to fund in-house business concepts, built a business case, and secured funding to bring it to life. Seeing it implemented and adopted by clients has been incredibly rewarding.

What makes it especially meaningful is the impact. The integration has improved workflows, strengthened client engagement, and provided better operational oversight. The real accomplishment is making life easier for our clients.

Establishing this connected foundation also positions trust companies to leverage emerging technologies such as artificial intelligence. These tools can automate routine processes, surface insights, and improve decision-making across the organization.

## What is a key challenge in wealth management, and how are you positioning your business to meet it?

Talent remains a significant concern. As many experienced trust operations professionals retire, firms are reckoning with a lack of available, trained, early and mid-career staff to replace them.

At the same time, the work isn't getting any simpler. That combination is pushing companies to rethink how they operate, including outsourcing parts of their back office to reduce key-person risk or fill capability gaps.

We're addressing this through SS&C Black Diamond Managed Services, which enables trust companies to scale operations without increasing headcount. Firms can choose targeted operational support or a fully managed back office while retaining fiduciary control.

This fully integrated managed services model combines fiduciary expertise with technology and operational support. The suite helps wealth management firms streamline functions such as cash management, securities processing, income administration, reconciliation, reporting, and other operational workflows through standardized, scalable processes. Our goal is to empower companies not only to outsource work but also to deliver results; help them scale efficiently while delivering strong client service.

## What does winning this award mean to you, and how will you use this recognition going forward?

I'm honored to be recognized as an industry leader, particularly as a woman in this space, and grateful to work for a company which values and supports women in leadership.

Above all, I hope this recognition encourages others, especially women, to pursue careers in the trust and retirement industry. There is tremendous opportunity in our field, and it's an area where you can make a real impact.