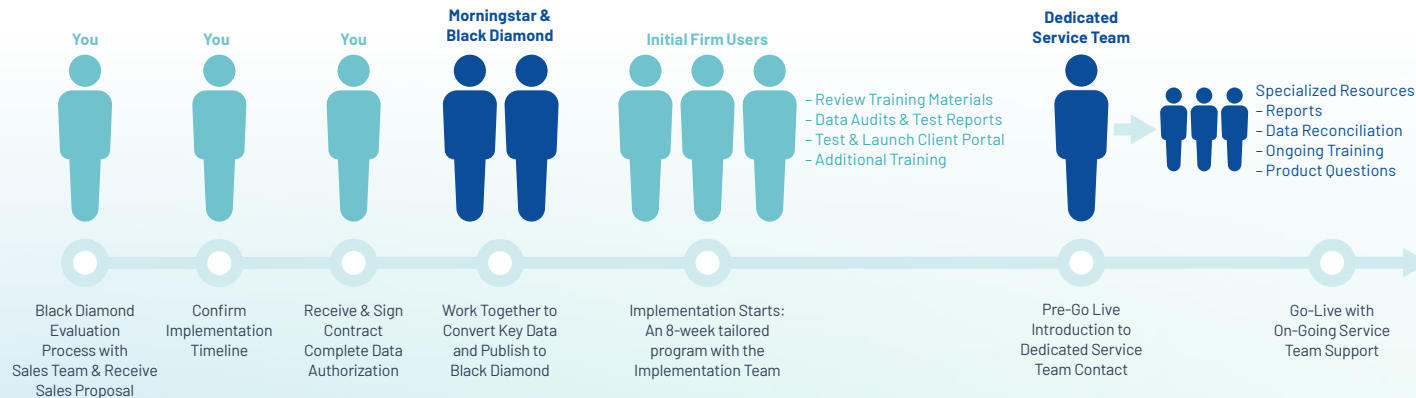


The Black Diamond Transition Advantage

Providing a smooth and customized data conversion and implementation process, along with dedicated and unlimited support post go-live.

With Black Diamond's industry-leading service model, you are able to go through the implementation and setup of your firm while running parallel on both platforms and only paying for one. As part of our specialized implementation process, your firm will have access to customized training content and implementation resources designed for Morningstar Office users. As you complete the 8-week implementation program, you will be introduced to your Dedicated Service Team who will be available for all of your ongoing service needs, allowing you to focus on your business and your clients.



Additional benefits of the Black Diamond Transition Advantage include:

No Double-Pay: Once you are billed by Black Diamond, you will stop paying Morningstar, and continue to run both platforms during implementation

Waived Implementation Fees:
You will not pay implementation fees for Black Diamond

Select Pricing Options for Morningstar Office Users:
If you sign with Black Diamond by June 30, 2025, you will receive special pricing

Customized and Streamlined Data Conversion Process: Morningstar and Black Diamond will manage most of the data conversion for you

Access to Direct Advisory Suite:
You will receive access to the industry-leading research & analytics you are accustomed to

This communication is provided by SS&C Advent, a business unit of SS&C Technologies, for information purposes only and should not be construed as or relied on in lieu of, and does not constitute, legal advice on any matter whatsoever discussed herein. SS&C Advent shall have no liability in connection with this communication or any reliance thereon.

©2025 SS&C Technologies Holdings, Inc. SS&C Black Diamond Wealth Solutions is a product of SS&C Advent.