

PRODUCT BRIEF

Asset Manager Sponsor Program

Access professionally managed models with outsourced trading and rebalancing, at no additional cost, helping your firm scale managed portfolios without adding operational complexity.

The asset manager sponsor Program from SS&C Black Diamond® Wealth Solutions gives advisors access to professionally managed model portfolios with outsourced trading and rebalancing, at no additional cost for qualifying accounts.

Designed to simplify portfolio management and improve operational efficiency, the program connects advisors with leading asset managers through the Black Diamond Model Marketplace while reducing the complexity traditionally associated with model delivery and trading workflows.

Through the Black Diamond Model Marketplace, advisors can access custom models at no additional cost. Participating asset managers sponsor outsourced trading and rebalancing for accounts allocated 100% to their models, helping firms scale managed account programs more efficiently while maintaining a high-touch client experience.

How the Program Works

The Asset Manager Sponsored Program combines the delivery of professionally managed models with outsourced trading and rebalancing capabilities through SS&C Black Diamond Managed Account Services.

Advisors can:

- Access asset manager models through the Black Diamond Model Marketplace
- Trade portfolios internally using Rebalancer
- Outsource trading and rebalancing to SS&C Black Diamond Managed Account Services
- Utilize customized model environments tailored to their firm

Key Benefits

Access Professionally Managed Models

Leverage model portfolios from leading asset managers directly within the Black Diamond ecosystem. Advisors can access tailored model marketplaces and customized model configurations designed to support firm-specific investment strategies.

Eliminate Trading & Rebalancing Costs

Qualifying advisors receive outsourced trading and rebalancing services at no additional cost through the sponsorship program.

Streamline Operations

Reduce manual portfolio maintenance with automatically managed, up-to-date model portfolios.

Maintain Flexibility

Choose the option that works for your client by manager, by strategy or by trading option (Advisor-Traded or Outsourced). There is no requirement to move your entire book to participate.

Transparent Fee Reporting

Deliver greater fee transparency with comprehensive gross and net-fee reporting powered by Black Diamond's integrated billing and analytics capabilities.

What's Included

Model Management

Asset manager models are automatically maintained and updated, helping reduce operational overhead for advisory firms.

Customized Model Marketplace

Dedicated model management environments provide advisors with streamlined access to the models most relevant to their practice.

Sponsored Outsourced Trading

Eligible firms can leverage outsourced trading and rebalancing services sponsored by participating asset managers.

Integrated Advisor Experience

Portfolio management, trading workflows, and model access are unified within the Black Diamond platform.

Two Ways of Running Your Models

You decide how you want to operate your practice:

- **Stay hands-on**

Use Black Diamond Rebalancer to trade and rebalance models yourself, and invest with leading asset managers like SS&C ALPS Advisors, Eventide, First Trust, Invesco, Vanguard, Zacks Investment Management.

- **Fully outsource**

Delegate trading and rebalancing to SS&C Black Diamond Managed Account Services, seamlessly integrated with the Black Diamond Rebalancer to provide a robust, automated solution.

Participating Asset Managers

The Asset Manager Sponsored Program includes the following asset managers:

- SS&C ALPS Advisors
- Eventide
- First Trust
- Invesco
- Vanguard
- Zacks Investment Management

Built for Growth

The Asset Manager Sponsored Program helps advisory firms:

- Scale managed account offerings efficiently
- Reduce operational complexity
- Expand access to institutional-quality investment strategies
- Deliver differentiated client experiences
- Improve consistency across portfolio management workflows

About SS&C Black Diamond Wealth Solutions

SS&C Black Diamond Wealth Solutions powers growth-minded wealth management firms with a connected ecosystem spanning portfolio management, reporting, CRM, trading, and client experience solutions. Through flexible technology and integrated workflows, Black Diamond helps firms scale operations while delivering personalized client service.

For More Information

Request a personalized demo today to learn how the Asset Manager Sponsored Program can help your firm simplify model management, reduce operational burden, and access professionally managed portfolios with no additional trading or rebalancing costs for qualifying accounts.

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To learn more about outsourced trading and rebalancing capabilities, explore the [SS&C Black Diamond Managed Account Services brief](#).