SS&C | Black Diamond WEALTH SOLUTIONS

CASE STUDY

Legacy Trust

Building a Scalable Foundation for Client Service and Growth

Legacy Trust is a trust-powered wealth management firm built on long-standing client relationships and a commitment to delivering personalized service across generations. As the firm grew, its team recognized the need for a technology foundation that could support increasingly complex client needs while maintaining the operational discipline and service model that define the organization.

Legacy Trust relied on its custodian's reporting platform for performance reporting and was in need of a portfolio management solution. While this approach supported the firm's day-to-day operations, it lacked the flexibility and scalability required to meet its future growth objectives.

The team saw an opportunity to modernize its technology environment with a platform that could provide more robust reporting capabilities, greater customization, and improved efficiency across portfolio management workflows.

Building a More Flexible Technology Foundation

As Legacy Trust evaluated potential solutions, the firm prioritized partners that could support its evolving needs without forcing the organization into a rigid operating model.

The firm ultimately selected SS&C Black Diamond® Wealth Solutions to enhance its performance reporting capabilities and establish a more scalable foundation for growth.

A key consideration throughout the decision process was preserving historical performance data. With decades of client relationships and valuable reporting history, Legacy Trust required a transition approach that maintained continuity and protected the insights its team relied on.

Turning Data Into Actionable Insights

The implementation process focused on migrating historical performance data and configuring Black Diamond to align with Legacy Trust's workflows. By working closely with its custodian and the Black Diamond team, the firm successfully

> "We were working with a system that got the job done, but it wasn't built to scale with us. We needed something more robust, and more importantly, something we could actually customize to the way we work.
>
> — **Gavin Anderson**
> Portfolio Analyst, Legacy Trust

Profile

Client: Legacy Trust

Location: Grand Rapids, Michigan

Description: Trust-powered wealth management firm serving multi-generational clients with complex assets, long-term relationships, and evolving reporting requirements.

Implementation Year: 2025

Background

- Sought a scalable platform to support continued growth across wealth management and retirement plan services.
- Prioritized improved reporting accuracy, data transparency, and reduced manual validation processes.
- Valued flexibility and customization to align technology with the firm's independent, collaborative culture.

transitioned its reporting environment while maintaining access to critical historical information.

With Black Diamond, Legacy Trust gained a comprehensive view of client portfolios across account types, enabling the team to deliver more timely and accurate reporting. Additionally, Black Diamond's centralized visibility helped portfolio managers respond even faster to client questions and better understand each client's complete financial picture.

The firm has also improved portfolio management efficiency through enhanced workflow capabilities, including rebalancing functionality that streamlines trading processes and reduces manual intervention. By creating a more connected view of client accounts, Legacy Trust has improved consistency across portfolio management activities while maintaining its focus on personalized service.

Positioned for Continued Growth

Since implementing Black Diamond, Legacy Trust has continued to expand its use of the platform to support operational efficiency and deliver a stronger client experience.

The firm values the ability to leverage a flexible solution that aligns with its independent approach and provides the scalability needed for growth. As the organization continues to evolve, Black Diamond provides the foundation to help Legacy Trust strengthen reporting, simplify workflows, and maintain the high level of service its clients expect.

> **"When markets get volatile, our advisors need answers fast. Black Diamond gives us a real-time view across all of a client's accounts—retirement, trust, investment advisory and charitable—so we're never scrambling to piece together that picture.**
>
> — **Gavin Anderson**, Portfolio Analyst, Legacy Trust

> **"What's stood out to me about the Black Diamond team is how responsive they are. Everything gets handled quickly. That kind of service builds real confidence in a long-term partnership.**
>
> — **Gavin Anderson**
> Portfolio Analyst, Legacy Trust

Benefits

- Modernized reporting infrastructure with a scalable platform designed for growth.
- Improved visibility across client portfolios with more timely performance insights.
- Preserved historical performance data while transitioning to a modern solution.
- Streamlined portfolio management workflows through enhanced rebalancing capabilities.
- Increased operational efficiency with a flexible platform aligned to firm processes.
- Strengthened client service through greater transparency and accessibility.

To learn more about Legacy Trust, please visit their website at www.legacygr.com.

Learn how SS&C Black Diamond Wealth Solutions can support your unique wealth management business.

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