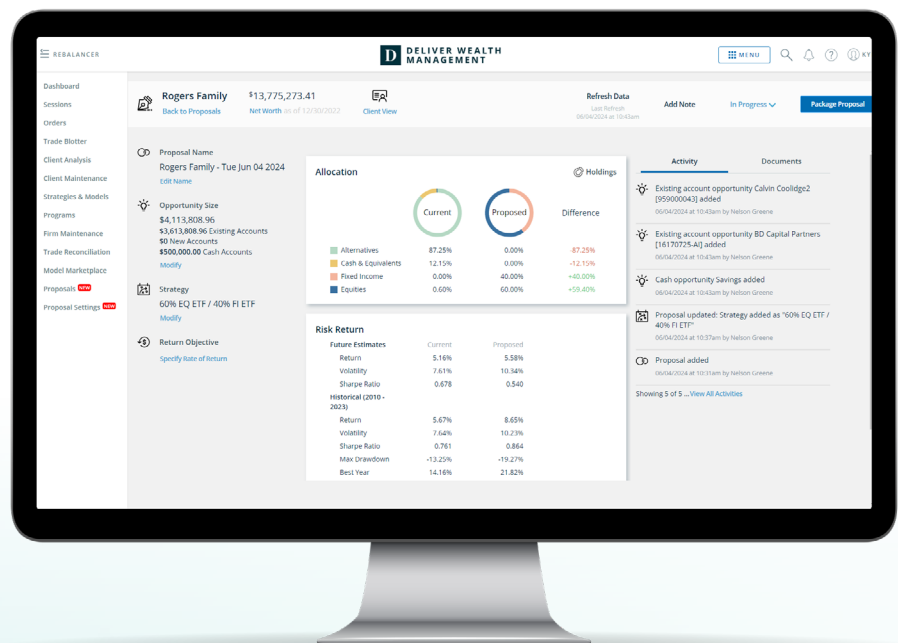


PRODUCT BRIEF

Proposal Generation & Model Marketplace

With the combined power of Black Diamond's next-generation Rebalancer and investment management expertise, advisors can leverage simplified workflows and recapture valuable time.

First impressions are critical for financial advisors striving to build trust and showcase their expertise in today's fast-paced and digital-first world. One of the challenges lies in differentiating themselves and effectively communicating their value proposition. For many advisors, creating initial investment proposals and delivering market insights requires a meticulous and often labor-intensive process. Advisors frequently encounter disorganized client data, causing them to spend valuable time piecing together information from various formats to develop accurate and compelling proposals.



The Black Diamond *Proposal Generation* application and *Model Marketplace* are two cutting-edge investment management tools at the core of the award-winning, cloud-native Black Diamond. Powered by SS&C ALPS Advisors' leading expertise in investment management, curated low-cost ETFs, and multi-manager, outcome-oriented model portfolios, these first-ever native integrations are complimentary offerings for advisors leveraging Black Diamond's Rebalancer.

Together, they provide a turn-key solution that delivers modern, time-saving tools focused on elevating the client experience and investment goals.

Explore the Power of Proposal Generation

The Black Diamond *Proposal Generation* application offers advisors several key features that streamline what is typically a cumbersome and error-prone process.

Intuitive Workflow:

- Guides advisors through each step of the proposal creation process.
- Within *Proposal Generation*, set return objectives and review risk-return and forward-looking projections.
- Include custom commentary in the Proposal Package.
- Facilitates the integration of client goals into the Strategy and Model selection.

Streamlined Data Integration:

- Import existing client accounts and relationships directly from Black Diamond.
- A seamless interface to a central repository for inserting financial data from various sources, including spreadsheets, statements, and notes.
- Reduces the time and effort required to compile, organize, and store client information.

Enhanced Model Recommendations:

- Leverages your own Strategies from within the Black Diamond Rebalancer or those from the *Model Marketplace* to highlight proposed investment strategies.
- Fine-tune proposed portfolio weights and highlight a client's trade restrictions.

Efficient Proposal Generation:

- Enables the creation of modern, customized proposals at scale.
- Ensures each proposal is a comprehensive PDF with detailed information about risk, return, and holdings exposure.
- Track updates and changes and set the status of Proposals to manage progress.

Stand Out Functionality

Simulate and Forecast Risk and Return

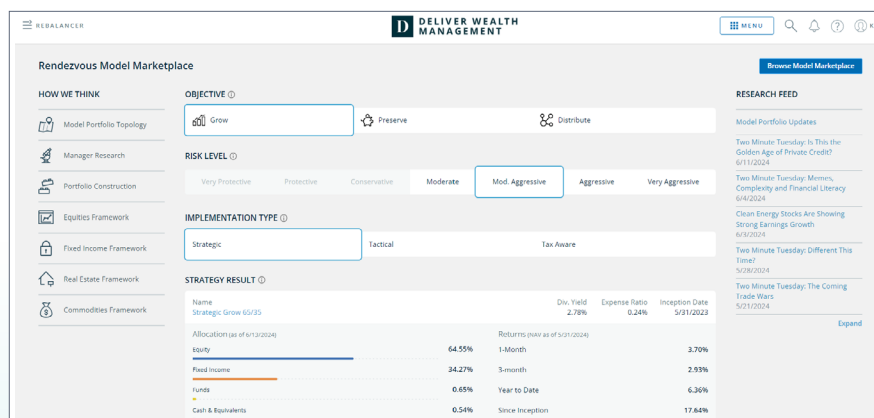
- Use factor risk models to capture the current and proposed portfolios' exposures and simulate hypothetical historical performance and risk.
- Provide expectations for portfolio risk and return using institutional grade, integrated capital markets assumptions.

Goals-based Probability of Plan Adjustment Analysis

- Input the required rate of return and compare the likelihood of achieving the client's goals for the current portfolio relative to the proposed portfolio.

Integration of Private and Public Markets Portfolios

- Consider private holdings alongside public assets when comparing portfolios.



Filter strategies by objective, risk, and implementation, view detailed results, explore model construction insights, or browse independently.

Differentiate your brand with *Proposal Generation*, saving you time and reducing errors. The intuitive data collection and proposal creation processes allow advisors to focus more on client interactions and strategic planning. This enhanced process helps to minimize the risk of errors that often occur during manual data entry and compilation. The high-quality, personalized proposals created within *Proposal Generation* help advisors stand out in a crowded market, showcasing their expertise and commitment to client goals.

Streamline the Model Assignment Process

The *Model Marketplace* is a native integration within the *Rebalancer* application and provides complimentary access for users to browse and subscribe to SS&C ALPS Advisors' actively managed Models or Strategies. When subscribed to a Model or Strategy, you can assign and trade against the allocation in the Rebalancer.

Strategies are complete asset allocation mixes that blend several Models together to meet a specific investment goal. Within the Strategies

detail page, you can look into all the Models and underlying holdings that comprise the Strategy.

By fully integrating these investment management tools within *Rebalancer*, advisors have a comprehensive, intuitive, and reliable investment management solutions within Black Diamond. The Black Diamond *Model Marketplace* and *Proposal Generation* empowers financial advisors to navigate the complexities of portfolio management with precision and efficiency while also revolutionizing how financial advisors create and present investment proposals.

Key Benefits of the Model Marketplace

1. Integrated into the Black Diamond Rebalancer.
2. Curated selection of low-cost ETF, multi-manager, outcome-oriented model portfolios managed by SS&C ALPS Advisors.
3. Intuitive guide to review the inventory of Models and Strategies.
4. Search by *Objective* (Grow, Preserve, Distribute), *Risk Level* (Protective to Aggressive), and *Implementation Type* (Strategic, Tactical, Tax Aware).
5. The option to subscribe to *Strategies* or integrate their completion models with your own strategies.
6. Automated *Model* and *Strategy* component updates that flow directly into Rebalancer daily.
7. Insight into markets and investment philosophy provided by Black Diamond Investment Management Services.

For more information

Learn how Black Diamond Wealth Solutions can support your unique advisory firm.

sscblackdiamond.com
info@sscblackdiamond.com
1-800-727-0605