SS&C | Black Diamond
WEALTH SOLUTIONS

The **Cornerstone** of a Successful Business

sscblackdiamond.com

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Build with SS&C Black Diamond Wealth Solutions

Simplify your tech stack. Streamline operations. Elevate your client experience.
All through a premier suite of integrated wealth management technologies and services.

Reliable Foundation

Backed by SS&C Technologies, gain the confidence of a global leader delivering innovation, stability, and the strength of a proven industry powerhouse.

Unified Support

Get the support you and your team need with exceptional service designed to help you get the most from your solution suite — every step of the way.

Tailored Configurations

Configure solutions to align with your firm's goals, operations, and existing technology, enabling you to scale efficiently and stay focused on growth.

Complete, Single-Source Solution

Break down silos, streamline operations, and connect every part of your business to work smarter and serve clients better.

Scalable, secure, and built for success.

837K+

Active users

Across firms leveraging CRM, portfolio management, investment management, oversight, and trust solutions.

$3.6T+

AUM

Financial firms of all sizes count on Black Diamond to help run their business.

8.2

Net Promoter Score

Clients rank us among the best in customer satisfaction.

$15B+

Invested

Fueling innovation through research, development, and acquisitions since 2012.

* As of July 2025

Where Every Corner of Your Firm **Connects**

Across the industry, firms of every size and specialty trust Black Diamond to fuel sustainable growth and elevate the experiences they deliver to clients.

- RIAs
- Family Offices
- Breakaway Advisors
- Banks & Trust Companies
- Foundations
- Broker-Dealers
- Aggregators
- Retirement Service Providers

SS&C
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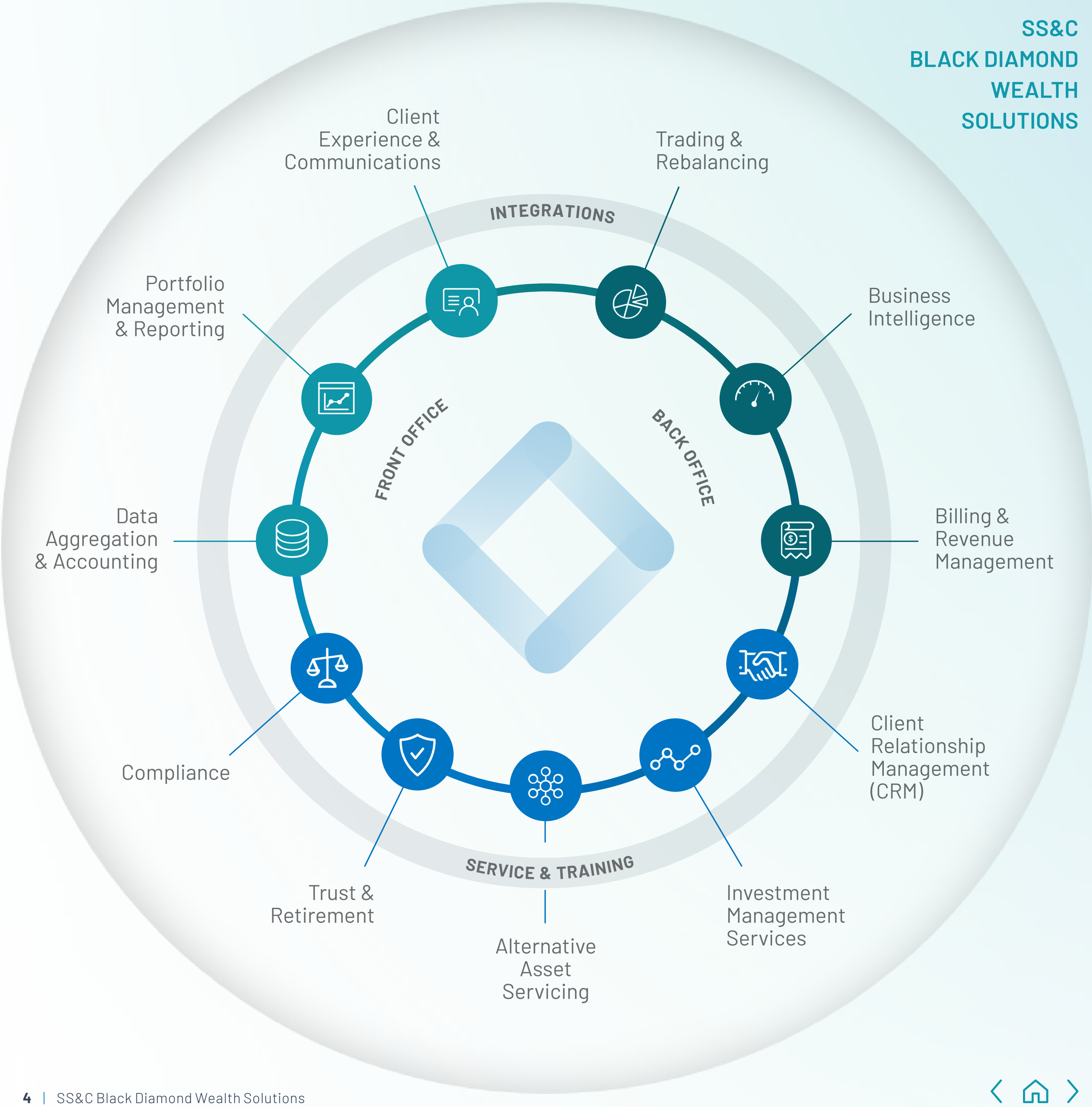
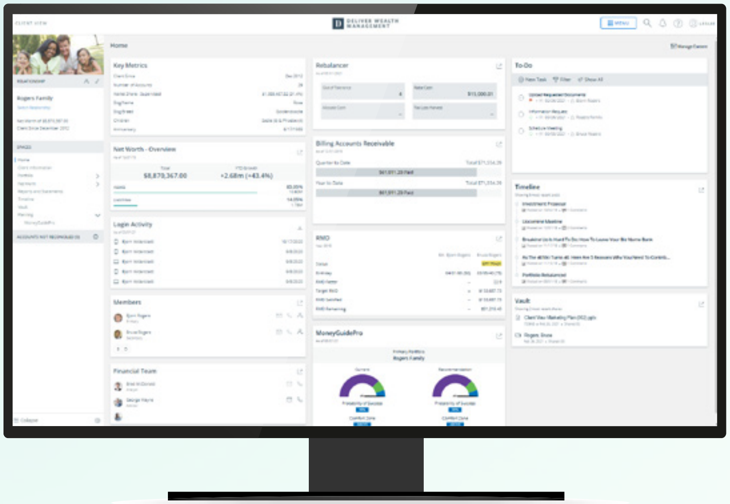




FRONT OFFICE

Client Experience & Communications

Through a custom-branded, interactive client portal, you can document advisor-client communications, showcase dynamic portfolio metrics, post to a secure document vault, incorporate outside account aggregation, balance sheet reporting, and more.

Portfolio Management & Reporting

Oversee portfolios in the context of the entirety of the client relationship through a centralized command center. Insights are viewable at-a-glance through dynamic and configurable portfolio metric cards, which can be expanded for in-depth analysis. The use of drag-and-drop functionality and pre-built templates make it easy to generate beautifully crafted reports that can be shared to your client's portal.

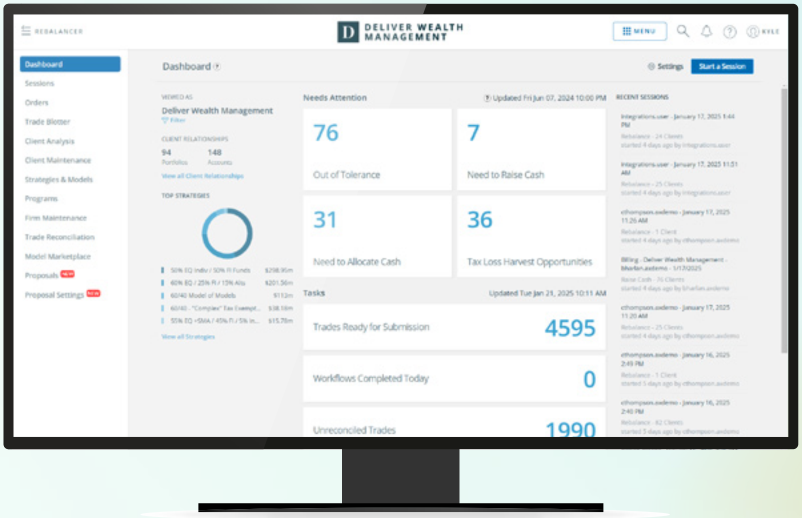
Data Aggregation & Accounting

Data is aggregated from hundreds of sources and reconciled to the asset level daily. Supplemental details, such as prices, indexes, and ratings, are added for quick analysis.

BACK OFFICE

Trading & Rebalancing

Monitor, rebalance, and execute trades at scale. The robust modeling framework, proactive monitoring, straight-through trade processing, and tax-efficient capabilities keep even the most complex portfolios aligned with your client's goals.



Business Intelligence

Take the pulse of your business, identify trends and outliers, and examine the finer details of advisor performance and your client relationships. Granular permission controls, compliance-ready formats, report automation, and more make oversight manageable while providing a 360-degree view into your practice.

Billing & Revenue Management

Itemize your value by structuring fees in a way that makes sense to both you and your clients. The countless configuration settings and built-in workflows allow a streamlined process, eliminating the need to run billing more than once per period.

SERVICE & TRAINING

Compliance

Stay audit-ready with scalable, daily surveillance of advisors, accounts, and transactions.

Leverage a powerful test library, real-time alerts, and case management tools—all configurable to your firm and integrated across systems.

Investment Management Services

Transform your practice with turnkey investment management solutions that combine institutional-quality portfolio management with streamlined operations. Automated rebalancing, proactive tax-loss harvesting, and personalized ETF model portfolios work directly with your Black Diamond portfolio reporting and communication tools to help you deliver exceptional client outcomes at scale.

Trust & Retirement

From real-time trust accounting and dynamic reporting to automated retirement payment processing, Black Diamond gives you specialized capabilities and integrated workflows to meet complex fiduciary needs with confidence.

And when you need more, services like managed support and full-service fulfillment give your team the flexibility to focus on what matters most—your clients.

Alternative Asset Servicing

Manage alternative investments with ease—track returns, report exposures, and access key insights. Purpose-built tools simplify data entry, improve transparency, and bring alternative and custodial accounts together in one seamless reporting suite.

Client Relationship Management (CRM)

Purpose-built for wealth management, Black Diamond CRM solutions help you deliver proactive, personalized service at every stage of the client journey. Streamline prospecting, onboarding, and relationship management through intelligent workflows, centralized contact data, and seamless integrations—so you can grow relationships and scale efficiently.

Committed to Your Success

For us, service isn't a department — it's a culture. From day one, our dedicated service and implementation teams act as an extension of your business, providing hands-on, end-to-end support across all our solutions.

Strategic Implementation
Purpose-built to fit your firm's needs.

Ongoing Education
Maximize efficiency and stay ahead of industry trends.

Proactive Service Team
Support that feels like an extension of your staff.

Professional Services
Custom development, legacy system integration, and more.

We invest in our culture because it yields results.

8 consecutive years as a "Best Place to Work"
Jacksonville Business Journal (2017-2024)

60% of the Black Diamond Team is Dedicated to Support Services

Your Tech, Your Way

Break down data silos. Design custom workflows. Automate processes.

You're in control. We power the possibilities.

Flexible API for Advanced Customization

Enhance functionality and tailor workflows to align with your firm's operating style.

Vast Network of Prebuilt Integrations

Connect seamlessly with third-party CRMs, financial planning tools, custodians, and more.

Resources and Support to Maximize Your Experience

From onboarding to optimization, we're here to help you maximize the benefits of your integrated ecosystem.

Featured Partners & Integrations

Insurance

Get direct, no-cost access to a range of best-in-class annuity, life insurance, disability, and long-term care solutions.

Retirement Savings

Easily trade, aggregate, report, and bill on clients' held-away 401(k) accounts, all without taking custody of a client's account credentials directly.

Portfolio Analytics

Powerful data and analytics to simplify workflows and personalize advice.

Financial Planning

Easy-to-use, plug-and-play functionality for financial planning enables advisors to focus on client interactions.

Managed Accounts

Leverage a turnkey asset management platform within a unified managed account, offering access to hundreds of third-party investment strategies from top managers.

For More Information

If you would like to learn how SS&C Black Diamond Wealth Solutions can support your business, call **1-800-727-0605** or email **info@sscblackdiamond.com.** You can also visit **sscblackdiamond.com.**

SS&C Black Diamond Wealth Solutions is the premier suite of technology and services built to simplify operations, strengthen client relationships, and support the long-term growth of wealth management firms.

As the centralized foundation for portfolio accounting, investment management, CRM, compliance, and client engagement, Black Diamond enables firms to streamline workflows and tailor their tech stack to meet evolving needs. Strategic integrations and a personalized service model provide the flexibility and support wealth managers need to scale with confidence.

Backed by SS&C—a global leader in financial services software—Black Diamond offers a future-ready solution grounded in experience, innovation, and true partnership.