SS&C | Black Diamond WEALTH SOLUTIONS

RightCapital

FINANCIAL PLANNING

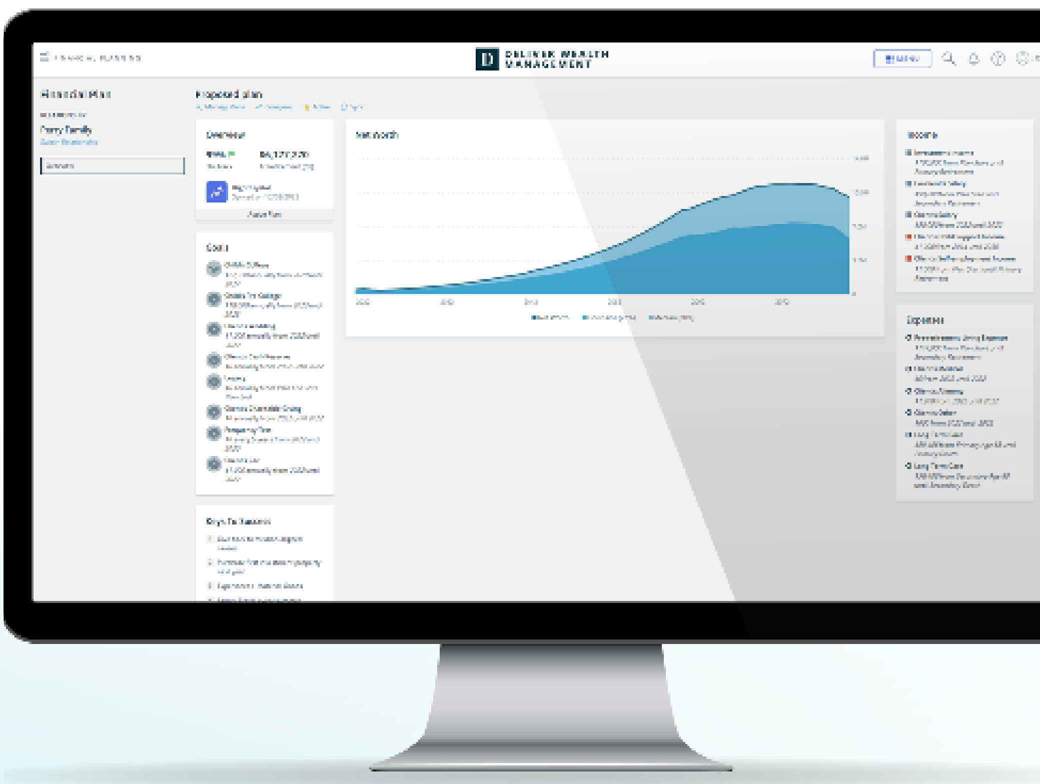
Elevate the Financial Planning Experience with RightCapital

Differentiate your services by simplifying the planning process.

Financial planning is a critical component of most client meetings and one of the primary ways advisors can provide value. It is not a static snapshot for clients but rather an ongoing conversation.

To help you serve your clients, SS&C Black Diamond® Wealth Solutions seamlessly integrates with RightCapital, which specializes in next-generation financial planning software, allowing advisors to differentiate their services by doing more planning in less time. From interactive retirement planning and tax-efficient distribution strategies to insurance evaluation, student loan management, and estate planning, RightCapital offers comprehensive planning modules that are simple to use.

RightCapital's intuitive visuals make it easy for advisors to collaborate with clients and show the dollar impact of their recommendations in real-time. In addition, using RightCapital's modular platform, advisors can
choose specific planning modules to focus on based on their client niche and be as detailed and high-level as they prefer.



The perks of partnership.

Through the two-way integration, key financial planning data is pulled into Black Diamond, and then account and portfolio information is pushed back to RightCapital in a continuous loop. This integration redefines the planning experience by saving time and enabling a more synchronized user experience.

With RightCapital and Black Diamond, advisors can:

- Easily create a comprehensive financial plan in minutes with client account and holding data
- Leverage advanced tax-planning capabilities, such as Roth IRA conversion and tax-efficient retirement distribution strategy, thanks to the automatic import of the cost basis of holdings
- See a real-time update of a client's financial plans since holding and pricing information is automatically updated daily within RightCapital
- View financial plans in the Black Diamond Client Experience portal and post planning reports directly to Timeline

Accomplish more planning in less time through an innovative platform:

Collaboration. Compare multiple scenarios and illustrate stress tests through interactive tools.
Dynamic Planning. Show sophisticated projections and make adjustments on the fly.
Simplicity. Present a plan that your clients can understand.

A purposeful suite of tools

With Black Diamond as the cornerstone of your business, you can build an end-to-end, best-practice technology stack that enables you to manage your client's complete wealth picture and deliver tech-powered services that exceed their expectations. Black Diamond's innovative, cloud-based solutions and best-of-breed integrations help you optimize your business and strengthen your connections with clients and prospects.

For More Information

Connect with us to learn how the SS&C Black Diamond Wealth Solutions can power your business strategy.

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