

Black Diamond: Unifying Data, Technology, and Growth



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SSS&C Black Diamond® Wealth Solutions is more than a technology platform; it is a growth engine for modern wealth management firms.

More than 3,300 firms, representing over \$4.3 trillion in AUM, rely on Black Diamond to manage operations, engage clients, and drive sustainable growth technologies.

How has your company's technology strategy evolved to meet the changing needs of wealth managers?

Wealth managers are clear about what they want. They want seamless workflows, less complexity, and a trusted partner who understands their entire business.

In 2025, we evolved from delivering strong standalone solutions to building a truly unified wealth ecosystem. We brought together SS&C's wealth offerings, including Black Diamond, Innovest, Salentica, and other advisor tools, under one cohesive strategy and identity.

The result is less friction, more clarity, and greater scale.

By aligning our capabilities under one unified approach, we have made it easier for firms to grow without stitching together disconnected systems. Whether a firm is expanding into new markets, serving complex households, or scaling operations, we are delivering the end-to-end ecosystem they need at every stage of growth.

What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

The next five years will redefine wealth management.

Regulatory shifts, persistent market volatility, the largest intergenerational wealth transfer in history, and rapidly advancing technologies are reshaping client expectations.

Yet one challenge remains constant: fragmentation.

Too many firms operate across disconnected systems, siloed data, and workflows that do not scale. That fragmentation slows growth, increases risk, and limits innovation.

Our focus is clear. We are unifying data, technology, and processes into a premier, integrated wealth management platform. We help firms simplify their tech stacks, streamline operations, and unlock the full value of their client relationships.

Regulatory shifts, market volatility, intergenerational wealth transfers, and emerging technologies will reshape wealth management in the coming years. Fragmentation remains a key challenge, as many firms operate across disconnected systems, siloed data, and unscalable workflows. In response, Black Diamond is focused on bringing data, technology, and processes together to deliver a premier suite of wealth management solutions and services. Our goal is to empower firms to optimize every aspect of their practice, enabling them to simplify their tech stack, streamline operations, and better serve their clients.

What emerging trends are shaping the future of wealth management technology?

Artificial Intelligence is no longer theoretical; it is becoming operational.

Wealth managers are seeking ways to deliver highly personalized, differentiated client experiences at scale. This push requires unified data and intelligent systems.

The firms that win will leverage natural language queries across structured data, generate predictive client insights, automate intelligent workflows, and center the CRM as the hub of both human and digital advice experiences.

At Black Diamond, we are building AI-ready infrastructure, so clients can harness AI with confidence.

The future of wealth management belongs to firms that unify data, intelligence, and experience. We are building the foundation to help them lead.