

Legacy Tools Can't Support Modern Advice

From product innovation to leadership stability, here's how SS&C Black Diamond® Wealth Solutions outpaces other systems.

Choosing the right platform to power your firm's future is no small decision. While many solutions offer core functionality, only a few combine modern technology with forward-thinking leadership, ecosystem reach, and a commitment to advisor success.

Key Capabilities	Black Diamond	Older/Legacy Systems
Rebalancing Engine	✔ Modern, liquidity-aware, cash-flow sensitive	✘ Legacy system; lacks cash-awareness
Alternative Investment Support	✔ Native integration with SS&C Accord for streamlined alternative investment services	✘ Limited or manual workflows
Reporting Flexibility	✔ Branded, multi-entity, client-centric technology	✘ Basic templated reports
API & Integration Flexibility	✔ 80+ Best-In-Class Integrations + Open API, 1000+ feeds to financial institutions	✘ Closed or rigid integration paths
Real-Time Insights	✔ Live, household-level dashboards	✘ Delayed updates
Scalability Across Business Models	✔ Built for RIAs, hybrids, family offices, broker-dealers, aggregators, others	✘ Better suited for smaller firms
Senior Leadership Stability	✔ 17+ years average tenure at SS&C; FinTech/Wealth veterans	✘ Frequent turnover, inconsistent vision
Ecosystem Leverage	✔ Full access to the SS&C ecosystem solutions for CRM, insurance, and compliance	✘ Limited scope and reach
CRM Solutions	✔ Offers three, fully-integrated CRM solutions, two built on Salesforce Lightning, and one on Microsoft Dynamics	✘ Requires advisors to manage disparate systems and multiple data sources
Custom Client Portal & Mobile App	✔ A modern client portal, open API to financial planning tools such as, Nitrogen, RightCapital, and eMoney, plus synced custodian documents	✘ A dated portal, and closed off to best-in-class integrations
Portfolio Accounting & Data Reconciliation	✔ A native portfolio accounting system and robust data reconciliation process	✘ Disparate systems require data imports and extracts

Trusted Leadership. Trusted Solutions.

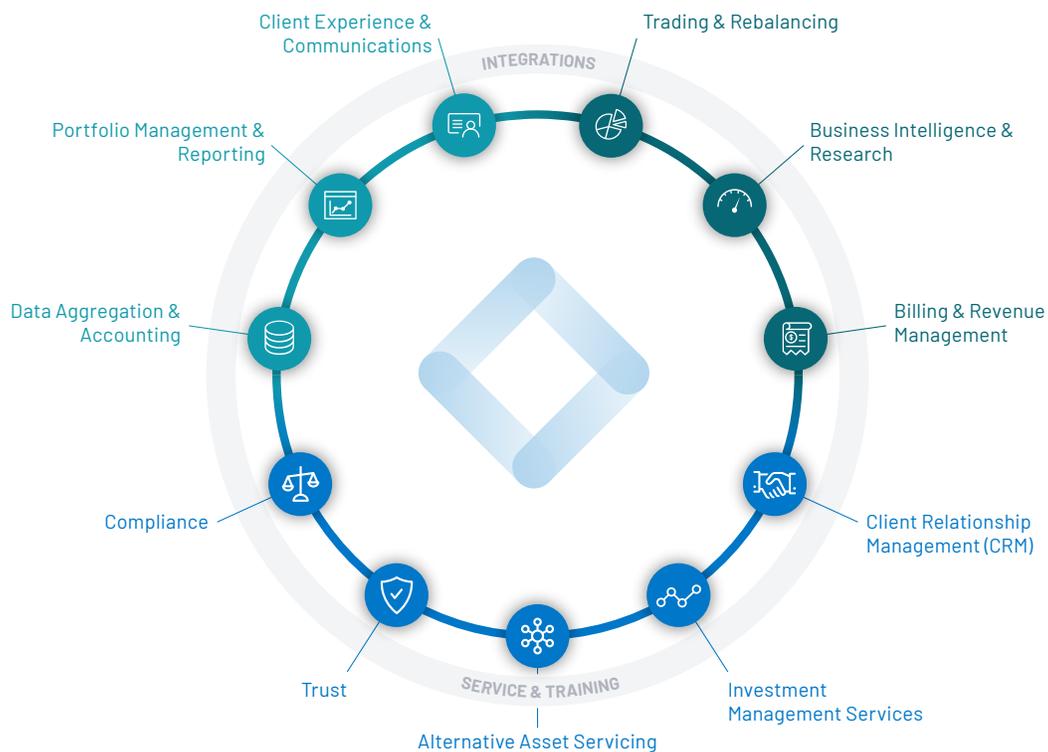
Forward-thinking wealth firms are choosing stability, scale, and speed—backed by leadership that lasts.

More than just a performance engine, Black Diamond is your comprehensive solution for modern wealth and trust management. With an experienced leadership team guiding the platform's growth, plus integrated services spanning CRM, client reporting, rebalancing, trust and retirement services, and alternative investment support—infused with Morningstar's Direct Advisor Suite—you're equipped for what's next.

Is Your Platform Ready for the Next 5 Years?

A future-ready partner should be able to answer yes to the following questions:

- Is the rebalancer capable of liquidity-aware cash management?
- Is the vendor's leadership team experienced and stable?
- Does the platform integrate directly with alts, insurance, CRM, a TAMP, and compliance tools?
- Can you customize and brand reporting at scale?
- Do you have access to live performance data?
- Are you part of a future-ready ecosystem or stuck in a closed one?



Ready to Reevaluate?

Join hundreds of firms who've switched from a legacy system to Black Diamond, a cloud-native, award-winning, next-generation wealth management platform.

To learn more, visit ssblackdiamond.com, call 1-800-727-0605, or email info@ssblackdiamond.com.

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