

PRODUCT BRIEF

Eliminate TAMP Trade-Offs

Scale faster without giving up control.

Unlike traditional TAMPs, which often require all-or-nothing adoption, SS&C Black Diamond® Wealth Solutions offers a modular platform fully embedded within Black Diamond’s Rebalancer, allowing you to selectively outsource portfolio operations while preserving your unique approach and investment philosophy.

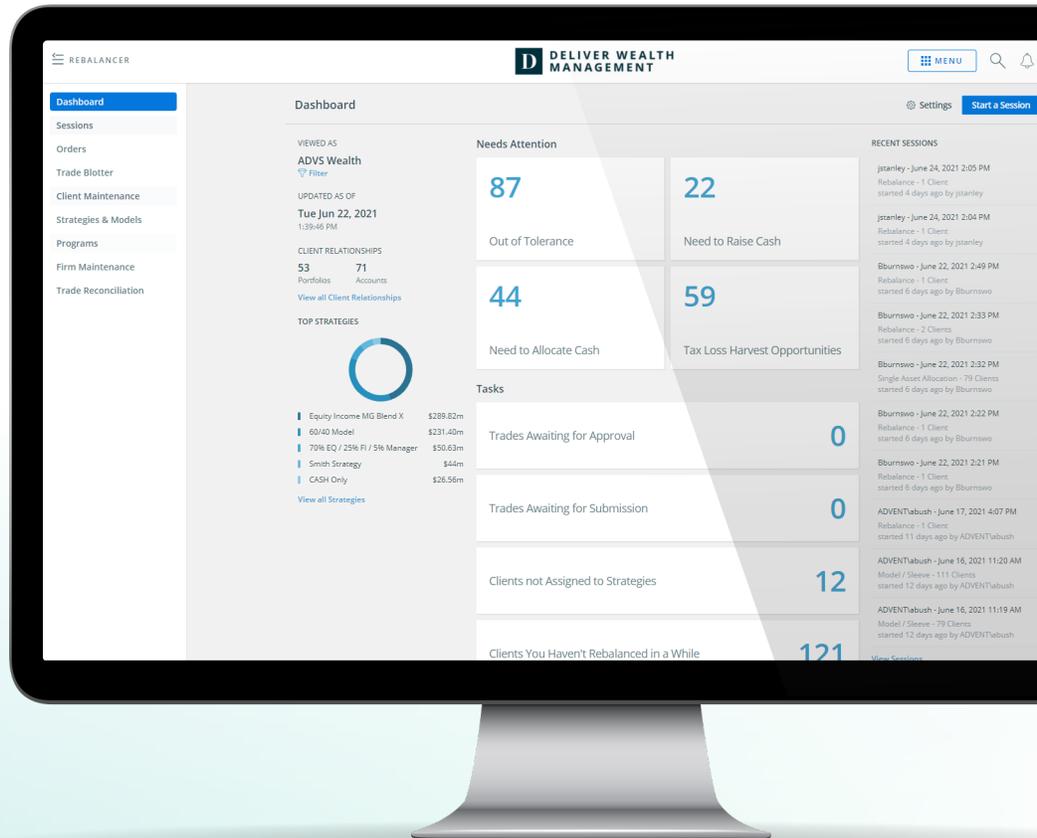
Designed to support modern advisory practices, Black Diamond’s Turnkey Asset Management Platform (TAMP) delivers the operational advantages of outsourcing without compromising flexibility, visibility, or the advisor-client relationship.

Modular by Design

Outsource only what you need, whether it is trading, model management, rebalancing, OCIO guidance, or more, without being locked into a bundled package.

Natively Integrated

Embedded within the next-generation Rebalancer, Black Diamond’s TAMP removes the need for external systems and disconnected workflows, while leveraging the same ecosystem you already use for reporting, proposal generation, and rebalancing.



An intuitive and proactive dashboard alerts you to items that need your attention.

Access Institutional-Quality Models

Tap into direct indexing capabilities and outcome-oriented, low-cost ETF, multi-manager model portfolios managed by SS&C ALPS Advisors, along with models from Invesco and Fidelity. Choose from curated Strategies or build your own by blending Models and sleeves to suit your investment approach.

Automated Rebalancing & Portfolio Updates

Daily model updates automatically flow into *Rebalancer*, reducing manual effort and streamlining operations. You maintain complete transparency and control over portfolio changes without the burden of re-entering data or monitoring separate systems.

Tax-Smart Management

Turnkey access to household-level tax-loss harvesting and direct indexing capabilities help optimize after-tax outcomes for your most tax-sensitive clients. The system also supports client-specific tax rates and tax cost budgets, allowing you to personalize tax management at scale.

OCIO Support, On Your Terms

Gain access to institutional-level manager research, asset allocation guidance, and economic commentary when and how you need it. You choose the level of OCIO engagement that best aligns with your investment model and client base.

Embedded Where You Work

All TAMP functionality is delivered within eliminating the need for new systems and duplicate data entry.

With everything under one roof, you gain:

- Unified workflows from proposal generation to reporting.
- Streamlined model and strategy assignment within *Rebalancer*.
- Complete transparency into what's happening behind the scenes.
- Client portal integration for secure, branded communications.

Tailored to Your Needs

Flexible and built for you—the TAMP solution is ideal if you're a Black Diamond client who is:

- Growing your advisory firm and looking to scale efficiently without additional headcount.
- Wanting to offload operations while maintaining control over investment strategy.
- Focused on custom portfolio design with tax management or OCIO support.
- Seeking a seamless experience for both your firm and your clients.

Elevate Efficiency Without Sacrificing Control

Black Diamond's modular TAMP, natively built within *Rebalancer*, delivers the power of institutional investment infrastructure while allowing you to choose what fits your practice.

Whether you're launching new client strategies, streamlining operations, or navigating market complexity, this solution supports growth on your terms.

Inquiry for Black Diamond TAMP

For more information, contact your SS&C Black Diamond Wealth Solutions representative, visit sscblackdiamond.com, or email info@sscblackdiamond.com.

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