

PRODUCT BRIEF

Easily Generate Powerful Client Reporting

Illustrate the complete wealth picture for your client

SS&C Black Diamond® Wealth Solutions gives you the power to confidently tell your story while customizing each client conversation. Highly configurable content, paired with the intuitive design of our *Report Builder*, allows you to reach your clients at their point of need—anytime, anywhere. This 24x7 transparency helps you demonstrate your value to prospects while strengthening your existing client relationships. Designed so you can easily showcase complex content and enhance your value proposition—the reports generated within Black Diamond are:

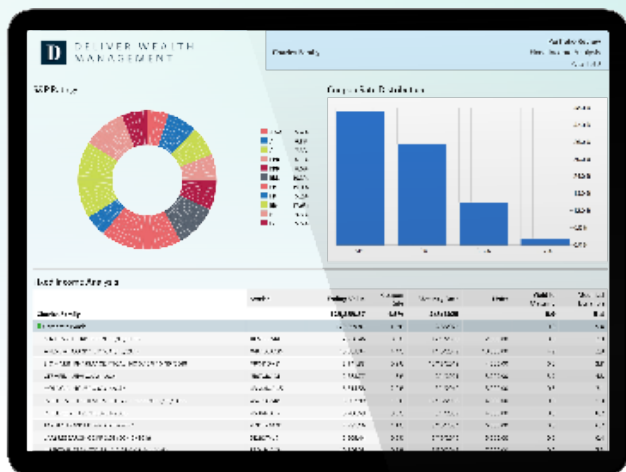
- Client-ready and fueled by reliable, clean data
- Configurable and customizable so they fit your firm's branding
- Optimized for smartphone, tablet, or desktop viewing
- Incredibly flexible, so that you can make on-demand changes
- Backed by the support of a dedicated, full-service team

Tailor your conversations

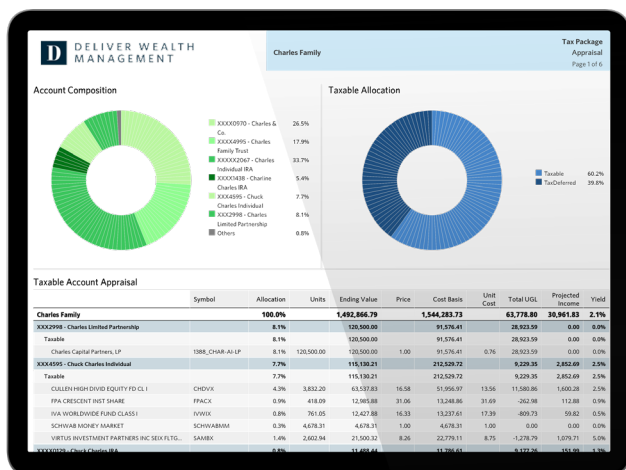
Create customized, branded reports from hundreds of object-driven templates, or build your own template using *Report Builder's* simple drag-and-drop tool. System flexibility enables you to make on-demand changes to existing reports or generate ad hoc reports on the fly, either for internal management or in response to client questions.



Portfolio Overview: Through an endless combination of data points, date ranges, and drag-and-drop page ordering, you can tell your story in a way that resonates with your clients.



Fixed Income Analysis: Enhance clarity by utilizing supplementary data points that help investors understand the composition of their fixed-income portfolio.



Portfolio Appraisal: Enjoy the flexibility of Black Diamond by breaking down your investors' holdings in a way that complements your value proposition.

Make an impact

Impress clients by presenting their portfolio and performance data in a personalized and effective way through the use of powerful graphical formats. By leveraging user-friendly tools and focusing conversations on what really matters to each client, you'll demonstrate how you're helping them reach their financial goals.

Black Diamond comes equipped and ready to help you generate an entire portfolio of reports, including but not limited to:

- Quarterly Performance Reports
- Portfolio Appraisals
- Tax Packages
- Fixed Income Summaries
- Transactions Reports

Grow your back office

You can leverage the power of your dedicated service team to create a true extension of your back office. From start to finish, our team can provide a comprehensive audit of your data, run and batch quarterly statements, and seamlessly post reports directly to your Client Experience Portal. From time-sensitive issues to custom-branded templates, our team is available to assist. No matter how big or small, help is ready when you need it.

For more information

Our robust reporting capabilities are in-depth yet intuitive and configurable, allowing you to effortlessly create on-demand reports tailored to your client's needs. With a team dedicated to your success, you will see first-hand how we are revolutionizing the wealth management experience.

If you have questions or would like to learn how SS&C Black Diamond Wealth Solutions can support your business, contact us today.

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