

PRODUCT BRIEF

Coming Soon: Black Diamond Artificial Intelligence

SS&C Black Diamond® Wealth Solutions is preparing to introduce an AI intelligence layer with embedded proactive insights, a smart chatbot, and automated workflows.

The Black Diamond AI Advantage

Wealth managers often spend excessive time searching across systems, manually analyzing portfolios, and managing repetitive back-office tasks. Firms that do not integrate AI risk falling behind as clients increasingly expect personalized, proactive service delivered efficiently.

Black Diamond AI empowers wealth managers by providing timely insights, natural language responses, and task automation within a single platform. Powered by SS&C's private cloud, client data remains secure by ensuring compliance, governance, and data protection.

Upcoming Black Diamond AI Features



Black Diamond Assist:

Introducing a conversational AI layer inside Black Diamond that makes the platform easier to use than ever.

Users can ask plain-language questions and get accurate, contextual answers instantly, without leaving their workflow or searching through documentation.

Powered by retrieval-augmented generation (RAG) over a curated Black Diamond knowledge base—Black Diamond Learn for firm users—this experience draws directly from product documentation and release notes to deliver trusted, up-to-date guidance right when it's needed.



Black Diamond Insights:

Black Diamond Insights are AI-generated summaries embedded directly within the platform, appearing in the areas where advisors and operations teams spend the most time.

While Black Diamond already excels at surfacing the "what," Insights are designed to reveal the "why."

By analyzing patterns in data, identifying emerging trends, and extracting meaningful context at scale, Black Diamond Insights eliminate the need for manual investigation and help users quickly understand the drivers behind portfolio and business activity.

Looking to the Future

Stay tuned for upcoming AI innovations from Black Diamond. By bringing secure, embedded AI directly into advisory workflows, firms can reduce manual tasks, improve efficiency, and deliver more proactive, personalized client experiences. As AI transforms wealth management, Black Diamond AI will help you stay ahead.



For More Information

For more information, please contact your SS&C Black Diamond Wealth Solutions representative, visit sscblackdiamond.com, call 1-800-727-0605, or email info@sscblackdiamond.com.