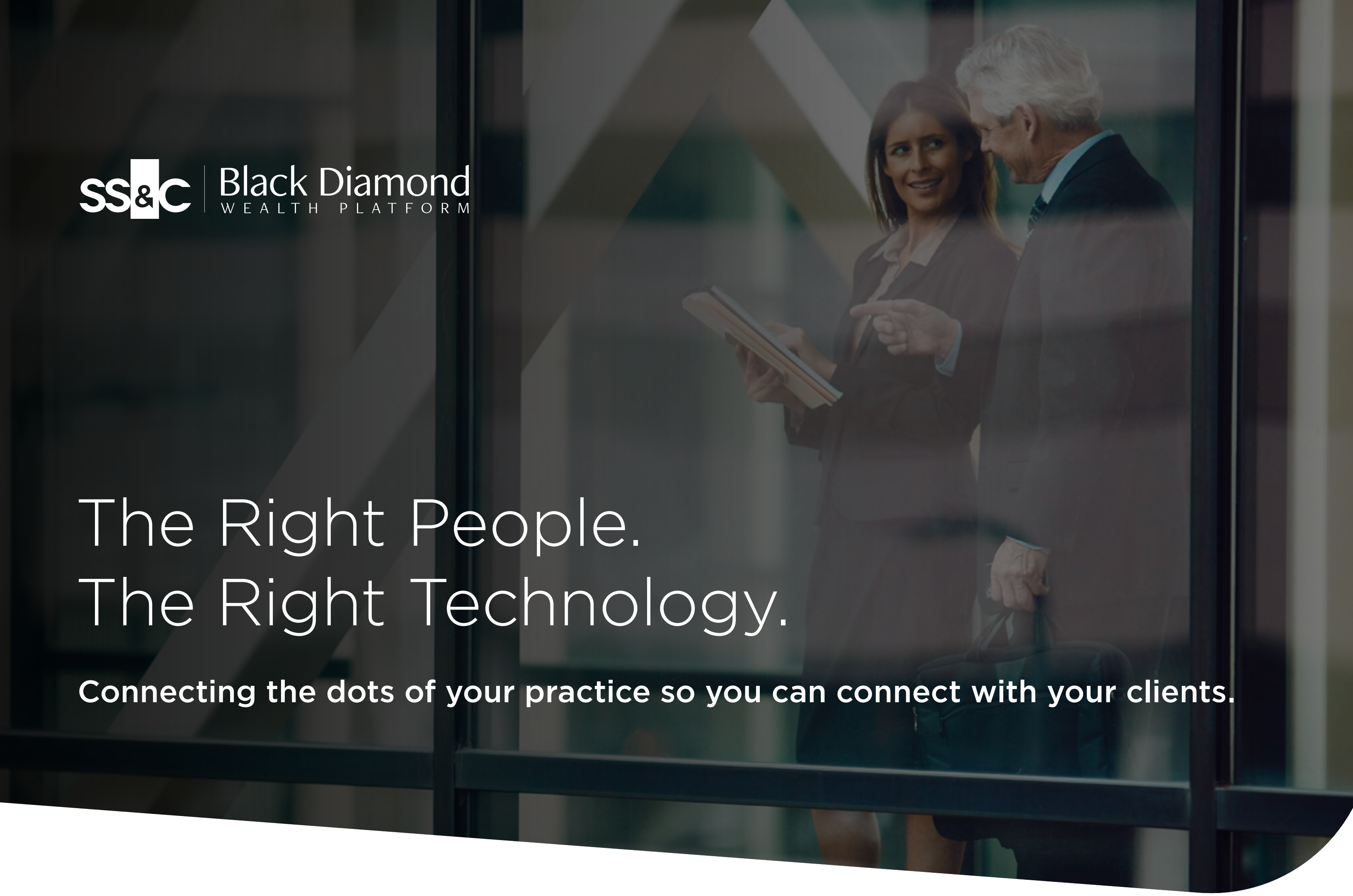


SS&C | Black Diamond WEALTH PLATFORM

The Right People.
The Right Technology.

Connecting the dots of your practice so you can connect with your clients.

blackdiamond.advent.com | info@advent.com

You don't need another product. You need a partner.

As an extension of your team, SS&C's Black Diamond® Wealth Platform provides you with tools to operate efficiently and deliver a sophisticated, modern client experience.

The Black Diamond difference means you gain:

— Forward-thinking technology that is continuously updated

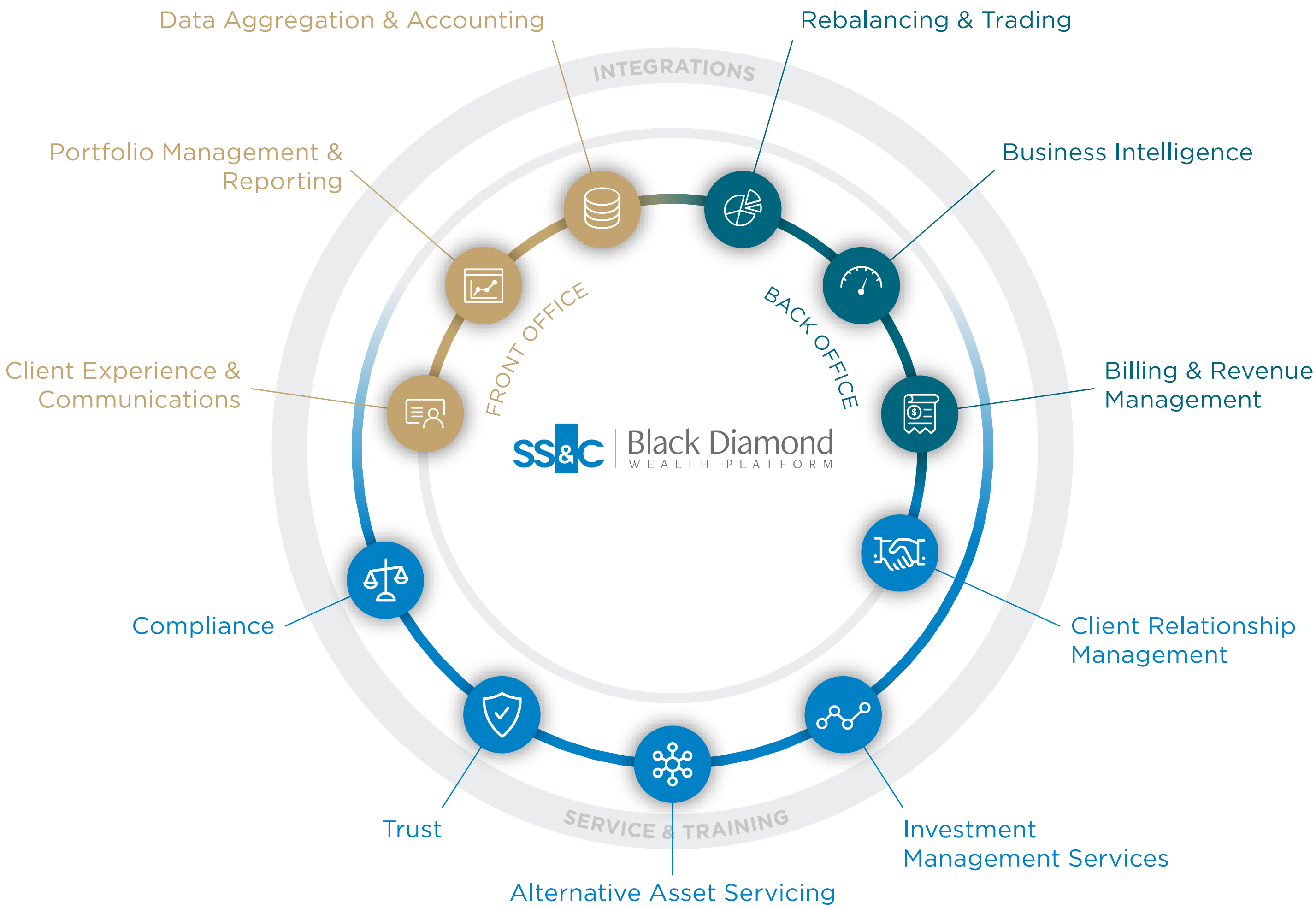
— An elevated client experience through a firm-branded, mobile-friendly portal

— A service team that provides dedicated, highly personalized support

— A purpose-built CRM connecting financial performance to the client relationship

— Prompt, reliable data aggregation that is automatically reconciled each day

— Access to a vast integration network of complementary solutions



At the Heart of Your Business: One platform to support your unique needs.

A Comprehensive Solution, Designed With You in Mind

Cloud-based. Client-focused. Complete.

FRONT OFFICE

Client Experience & Communications

Through a custom-branded, interactive client portal, you can document advisor-client communications, showcase dynamic portfolio metrics, post to a secure document vault, incorporate outside account aggregation, balance sheet reporting, and more.

Portfolio Management & Reporting

Oversee portfolios in the context of the entirety of the client relationship through a centralized command center. Insights are viewable at-a-glance through dynamic and configurable portfolio metric cards which can be expanded for in-depth analysis. The use of drag-and-drop functionality and pre-built templates make it easy to generate beautifully crafted reports that can be shared to your client's portal.

Data Aggregation & Accounting

Data is aggregated from hundreds of sources and reconciled to the asset level daily. Supplemental details are added such as prices, indexes, and ratings for quick analysis.

BACK OFFICE

Rebalancing & Trading

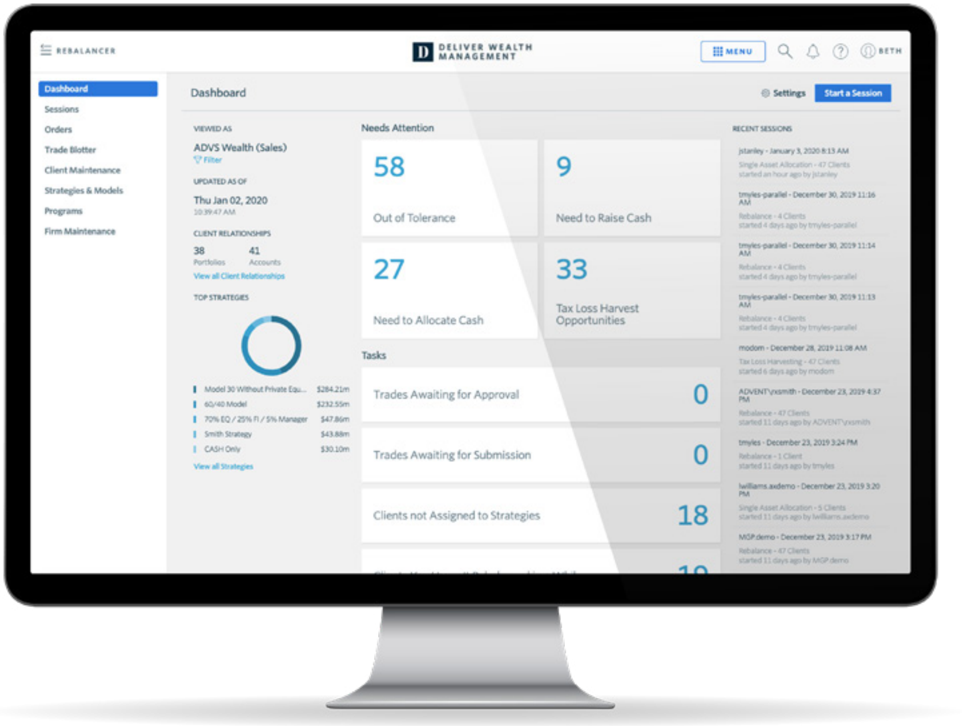
Monitor, rebalance, and execute trades at scale. The robust modeling framework, proactive monitoring, straight-through trade processing, and tax-efficient capabilities keep even the most complex portfolios aligned with your client's goals.

Business Intelligence & Compliance

Take the pulse of your business, identify trends and outliers, and examine the finer details of advisor performance and your client relationships. Granular permission controls, compliance-ready formats, report automation, and more make oversight manageable while providing a 360-degree view into your practice.

Billing & Revenue Management

Itemize your value by structuring fees in a way that makes sense to both you and your clients. The countless configuration settings and built-in workflows allow a streamlined process, eliminating the need to run billing more than once per period.



CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

Leverage the power of an enterprise CRM, delivered through a managed experience that saves you valuable time and resources. This turnkey, industry-specific solution enables you to provide a more personalized experience and manage and grow your client base.

Unlimited & Dedicated Support

Experience a complete service support team that feels like an extension of your back office, dedicated to understanding your unique business needs. From data research and custodial data intake to data reconciliation and issue resolution, our experts ensure you get the most out of the platform. With virtual and in-person ongoing training available, you'll maximize your ROI while enjoying peace of mind, knowing that our commitment to exceptional service is as strong as our focus on cutting-edge technology.

60%+

of Black Diamond employees are in Service

Full-time direct access to a team that knows your business

— No anonymous help-desk or 800 number

— Team-based approach to ensure no gaps in service when you need it most

Winner of the *Jacksonville Business Journal*'s "Best Place to Work" for seven consecutive years (2017-2023)

— We invest in our culture because it yields results

Enhanced by the Power of SS&C

SS&C Technologies' unique business model combines end-to-end expertise across financial services operations with software and solutions to services even the most complex firm's needs.

Our expansive ecosystem of deeply integrated solutions allows firms of all sizes and structure to help grow and deepen the advisor-client relationship, future-proof their business by expanding services, attract new talent, and more.

Key solutions include:

- SS&C Accord
- SS&C Advent Insurance Marketplace
- SS&C Innovest
- SS&C Rendezvous
- SS&C Risk & Compliance Intelligence platform
- SS&C Salentica® CRM

Create an Unparalleled Technology Ecosystem

An extensive integration network connects you to your choice solutions for financial planning, CRM, risk analysis, managed accounts, data services, and more. Bi-directional data feeds, single-sign-on, and incorporated content streamlines workflows and boosts productivity.

Featured platform partnerships do not limit your choices, but deliver an experience that exceeds expectations.

FEATURED PARTNERS & INTEGRATIONS

RIGHTCAPITAL

Financial Planning

Easy-to-use, plug and play functionality for financial planning allows advisors to focus on client interactions.

dpl financial partners

Insurance

Get direct, no-cost access to a range of best-in-class annuity, life insurance, disability, and long-term care solutions.

Moving the Industry Forward

No matter your size or structure, Black Diamond has the flexibility, infrastructure, and power to support your unique wealth management business:

— RIAs

— Family Offices

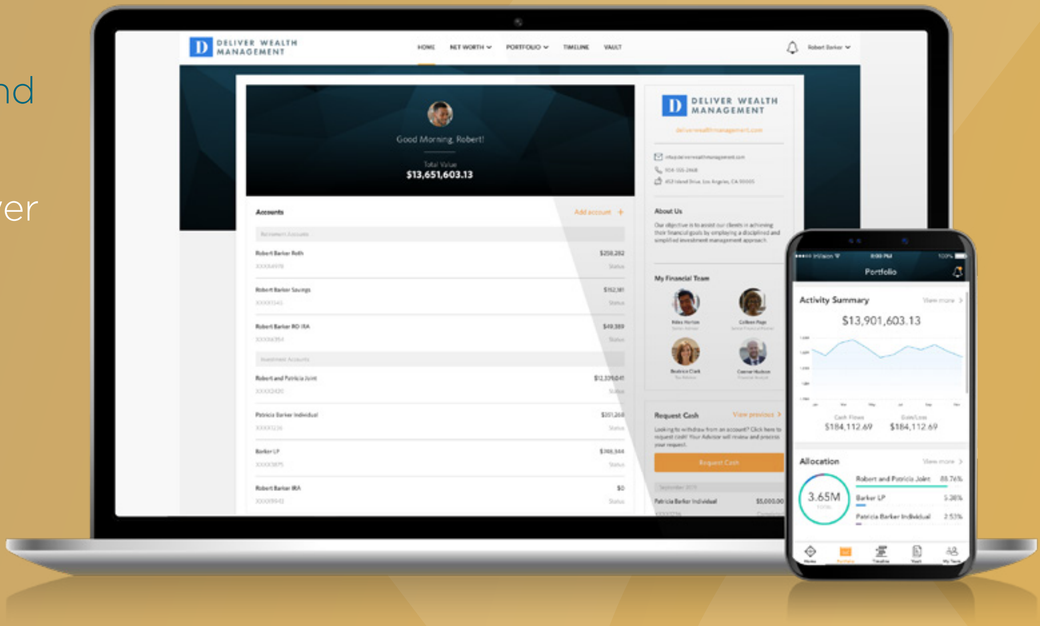
— Breakaway Advisors

— Trusts

— Foundations

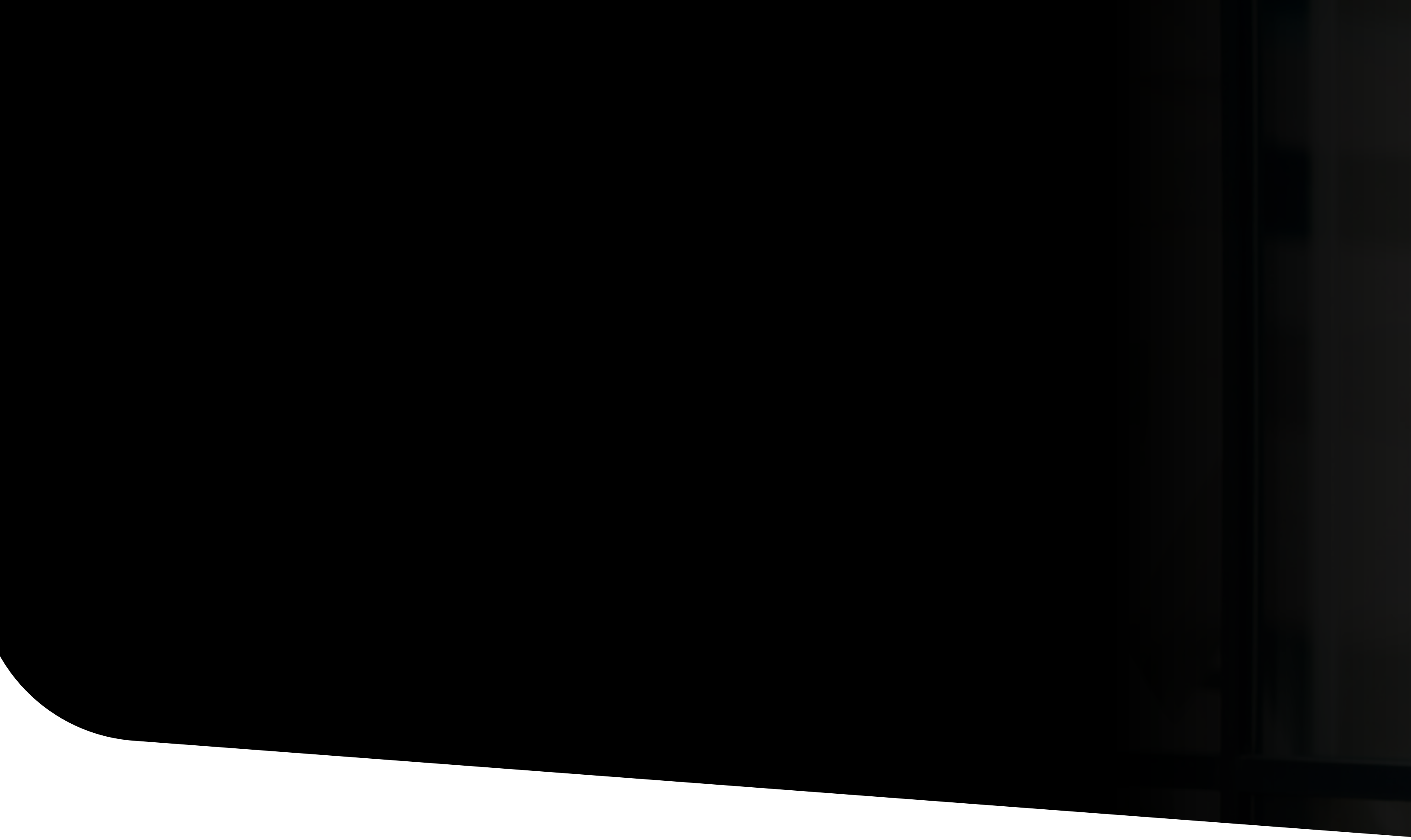
— Broker-Dealers

— Aggregators



For More Information

If you would like to learn how the SS&C Black Diamond Wealth Platform can support your business, call 1-800-727-0605 or email info@advent.com. You can also visit blackdiamond.advent.com.



SS&C Technologies' unique business model combines end-to-end expertise across financial services operations with innovative software and solutions for the financial services industry.

The SS&C Black Diamond® Wealth Platform is at the heart of SS&C's wealth management offerings. This powerful solution empowers wealth managers to leverage deeply integrated services and advanced technologies to thrive in today's dynamic global market. From prospecting and onboarding to proposal generation, a purpose-built CRM, ongoing portfolio management reporting, an interactive client portal, and more, Black Diamond delivers essential features, ensuring advisors can confidently achieve their business objectives.

Financial management firms of all sizes and structures leverage Black Diamond's flexibility, infrastructure, and power to streamline operations, deliver business insights, and connect with both prospects and clients to build long-lasting relationships.

For more information, visit blackdiamond.advent.com or contact us at (800) 727-0605 or info@advent.com.

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