Corporate Responsibility

REPORT

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1 Introduction

Letter from CEO and Chairman, Bill Stone

SS&C Technologies has served the most complex industries, financial and health, since 1986. With its focus on innovation, technological advancements and commitment to clients, we have grown through 60+ acquisitions to a global organization generating $5B+ in revenue.

At SS&C, we recognize that our success is rooted in our people, our communities and our planet. We employ a talented and driven workforce with diverse skills and backgrounds, and we invest in the communities where we live and work. Our sound governance structure and robust protection of information—including client data, employee information and intellectual property—are essential to our long-term sustainability and the trust of our stakeholders. We believe this future proofs SS&C and is critical to the markets we serve.

We recognize the importance of Environmental, Social and Governance (ESG) values and reporting to our key stakeholders. This year's refreshed report includes additional information on learning and development, ISO certifications and data center management, among others. We hope you appreciate the transparency and find value from this work. Thank you all for your continued support and interest in SS&C.

Sincerely,

BILL STONE

22,000+
CLIENTS ACROSS FINANCIAL SERVICES AND HEALTHCARE INDUSTRIES

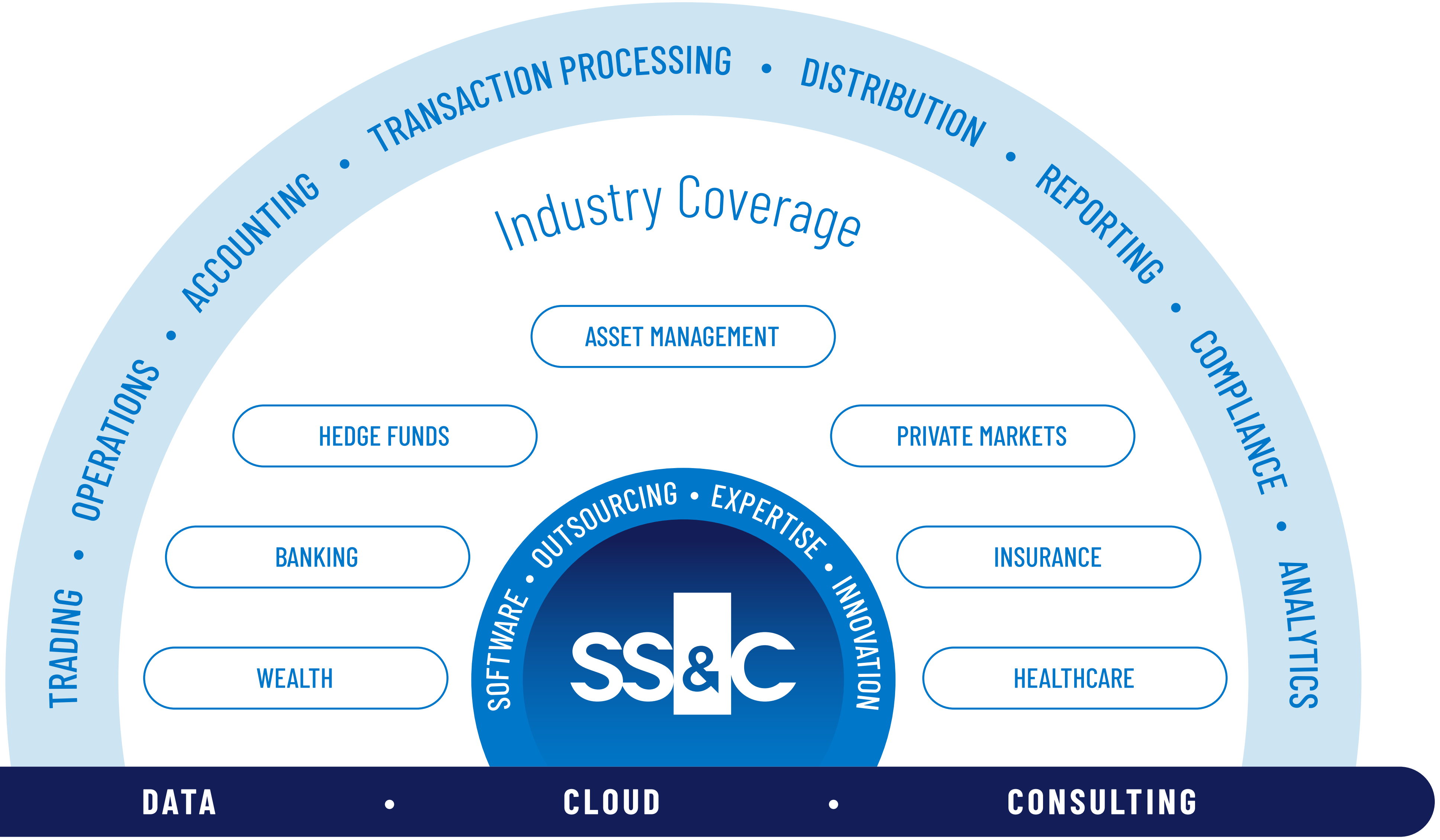
28,000
EMPLOYEES AROUND THE GLOBE

115
OFFICE LOCATIONS IN 35 COUNTRIES

$4T+
IN ASSETS UNDER ADMINISTRATION

Value in the Depth and Breadth of SS&C Offerings

39+ YEARS IN BUSINESS	$20B+ MARKET CAP
28,000 EMPLOYEES	$27.8B ENTERPRISE VALUE
22,000+ CLIENTS	200+ PRODUCTS & SERVICES
35 COUNTRIES	$5.88B+ IN ANNUAL REVENUE



Who We Are: SS&C Technologies

PUBLICLY LISTED (NASDAQ: SSNC)
OPERATING 115 OFFICES GLOBALLY

Focus on Expertise

- Committed to continuous training and employee development
- Broad distribution of equity awards align SS&C's business objectives with client satisfaction

Trusted Proven Provider

- $4+ trillion in assets under administration
- 45 million accounts maintained on SS&C's transfer agency platform
- 500 million health claims processed using SS&C's pharmacy solutions

Track Record of Delivery

- Provide market-leading software and service solutions to financial and healthcare industries globally
- Own and operate our data centers and private cloud
- SaaS, PaaS, license, services and hybrid delivery models
- Largest financial services and healthcare firms in the world rely on SS&C technology

PEOPLE

Global reach, local presence

Certified and licensed professionals:
Ph.D., CPA, CFA, FINRA, CA, PMP, CBCP, MBA, etc.

High tenure, high retention

PROCESS

Design and deploy target operating model

Comprehensive understanding of requirements

Institutional development feedback loop

TECHNOLOGY

SOC 2, high level of control

5,500 global technologists

Best of breed solutions, integrated platform

Blue Prism and AI throughout

SS&C's Corporate Responsibility Report

SS&C's Corporate Responsibility Program and report are shaped by the priorities of our key stakeholders, including investors, clients, employees and partners. ESG is part of our culture and reflects our dedication to fostering strong client relationships, advancing innovative technology and delivering value to both shareholders and society.

This report outlines SS&C's current efforts in these areas, along with plans and initiatives for the future. We remain committed to addressing customer and regional needs while ensuring compliance with all local regulations in the regions where we operate.

The report has been reviewed and approved by our management team and the Chair of the Nominating and Governance Committee of our Board of Directors, which oversees ESG matters.

This report is informed by ESG reporting frameworks such as Sustainability Accounting Standards Board (SASB) standards, Global Reporting Initiative (GRI) and Task Force on Climate-Related Disclosures (TCFD).

ENVIRONMENT

EMISSION
- ☆ GHG Emissions

RESOURCE USE
- Energy, Water, & Waste

SOCIAL

WORKFORCE
- ☆ Employee Attraction & Retention
- ☆ Learning & Development
- Labor Practices

COMMUNITY
- Community Engagement
- Living Wage/Income

GOVERNANCE

MANAGEMENT
- ☆ Board Composition & Governance
- ESG Products for Customers

STRATEGY
- ☆ Data Privacy & Cybersecurity
- ☆ Ethics & Reporting
- Competitive Behavior/Antitrust

☆ Priority Topics

2 Sound Governance

Sound governance is essential to the management and stability of SS&C's business. The executive leadership team and Board of Directors set high standards for employees, officers and directors by establishing and enforcing policies that promote integrity and ethical conduct throughout the organization. Key components of our governance program are outlined below.

Board of Directors

SS&C is governed by its Board of Directors ("Board"), which oversees the company's overall business affairs and provides strategic and operational oversight to support the long-term interests of the company and its stockholders. The Board serves as a prudent fiduciary for shareholders and oversees management's execution of SS&C's business strategy.

The Board follows the procedures and standards set forth in SS&C's bylaws, committee charters and corporate governance guidelines, which address:

- Roles and responsibilities of the Board.
- Leadership structure and the responsibilities of the lead independent director.
- Director independence and overboarding standards.
- Succession planning and retirement age policies.
- Board membership criteria and orientation.
- Committee structures and responsibilities.
- Continuing education requirements.
- Board and senior management evaluations.

Seven of the eight Board members are "independent" under Nasdaq criteria. Directors bring strong executive experience and skills aligned with SS&C's global business needs. The average director tenure is 14 years.

The Nominating and Governance Committee considers age, skills, background and experience to ensure the Board maintains a breadth of knowledge and abilities to fulfill its responsibilities. The Board meets at least quarterly and has three standing committees:

- Audit Committee
- Compensation Committee
- Nominating and Governance Committee
- Each committee operates under a Board-adopted charter.

EXECUTIVE COMPENSATION AND COMPENSATION COMMITTEE

The Compensation Committee oversees and administers SS&C's executive compensation program, which is designed to foster a performance-based culture that aligns executive interests with those of stockholders.

Objectives include:

- Attracting, retaining and motivating top executive talent.
- Rewarding achievement of strategic objectives.
- Aligning executive pay with stockholder interests through performance-based elements.

The program includes cash and equity-based components, with:

- Target cash bonus opportunities tied to pre-established, objective performance metrics.
- Long-term equity compensation allocated as 50% performance stock units (PSUs), 25% restricted stock units (RSUs) and 25% stock options, with PSUs earned upon meeting objective EPS growth targets.

The Compensation Committee's responsibilities are defined in its publicly available charter.

AUDIT COMMITTEE

The Audit Committee assists the Board in overseeing:

- The integrity of SS&C's accounting and financial reporting.
- Compliance with legal and regulatory requirements.
- Qualifications, independence and performance of the independent auditor.
- The internal audit function.

The Committee supervises financial statement audits, oversees internal and external audits and ensures internal controls are effective. All members are "audit committee financial experts" as defined by SEC rules. The Committee meets as needed to fulfill its responsibilities, which are outlined in its charter.

NOMINATING AND GOVERNANCE COMMITTEE

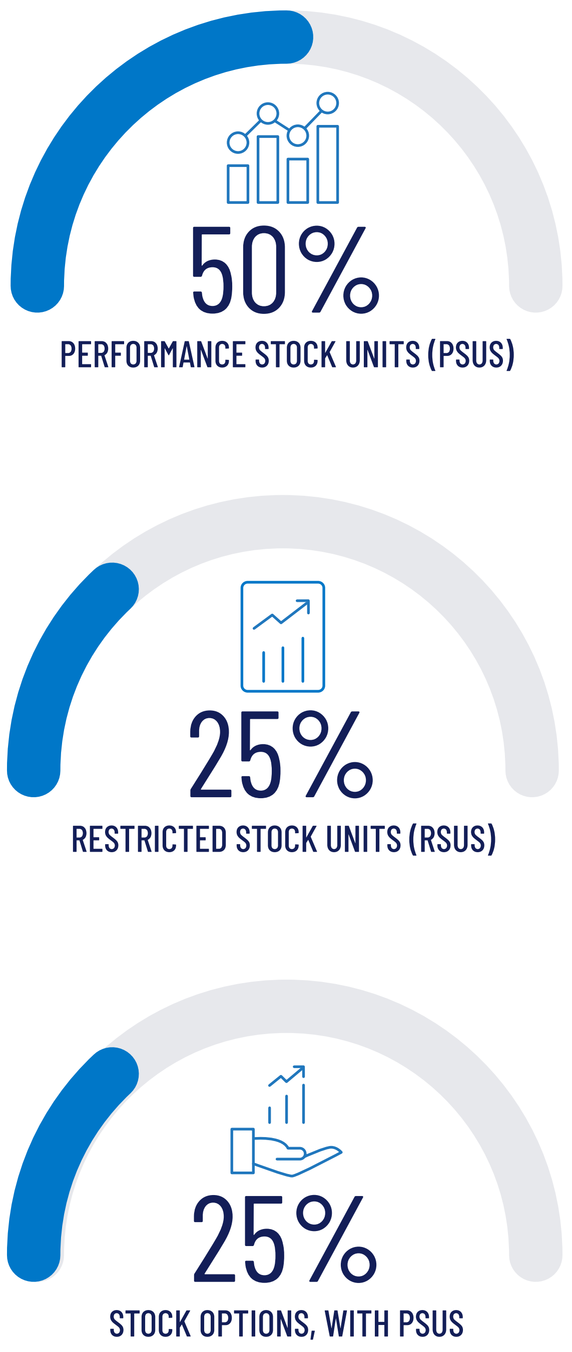
The Nominating and Governance Committee is responsible for reviewing the criteria for selecting Board candidates and identifying individuals qualified to serve as directors. It recommends nominees for election at stockholder meetings, candidates to fill Board vacancies and directors to serve on Board committees or as committee Chairs. The Committee also makes recommendations on determinations of director independence, oversees Board evaluations, reviews the adequacy of and compliance with SS&C's Corporate Governance Guidelines, and coordinates the Board's oversight of corporate responsibility matters in collaboration with other committees. In addition, it reviews and recommends succession plans for the Board and CEO.

The Committee meets as necessary to fulfill its responsibilities, but no less than once per fiscal quarter. Its responsibilities are set forth in its charter, which is publicly available.

When considering potential candidates, the Committee applies the criteria specified in its charter and the Corporate Governance Guidelines. Factors considered include independence, integrity, honesty, adherence to ethical standards, demonstrated business acumen, financial expertise, relevant experience, sound judgment, the ability to contribute to SS&C's decision-making processes, a commitment to understanding the company and its industry, active participation in Board and committee meetings, an understanding of the diverse interests of SS&C's stakeholders, and the absence of any conflicts of interest. No single factor is assigned a specific weight, and no criterion is a prerequisite for consideration.

In determining the overall composition of the Board, the Committee seeks to ensure a breadth of experience, knowledge and abilities that support the Board's responsibilities. Professional background, education and skills are considered to achieve a balanced mix of expertise. The primary objective in selecting Board members is to further the interests of stockholders through management experience, industry knowledge, understanding of the competitive landscape and familiarity with SS&C's target markets.

LONG-TERM EQUITY COMPENSATION ALLOCATED



Control Environment

RISK MANAGEMENT

Day-to-day risk management is the responsibility of SS&C's management, with oversight provided by the Audit Committee and the full Board of Directors. While the Audit Committee has primary responsibility, the Board is actively engaged in overseeing the company's risk management framework. This oversight is carried out through discussions on the policies and practices used to assess and manage risks, with the Board providing input and guidance.

SS&C's risk management program is comprehensive and multifaceted, designed to identify, assess, mitigate and manage risks across the enterprise. At the enterprise level, the program provides the overarching framework for risk reporting and management. At the business unit level, dedicated risk programs monitor and address risks specific to operations and products. Together, these layers deliver a multidimensional view of risk and implement multi-level controls to minimize exposure to SS&C and its clients.

An Enterprise Risk Assessment (ERA) is conducted annually across applicable entities. The ERA evaluates risks from both internal and external drivers, focusing on the company's ability to meet business objectives considering strategic, operational, compliance and financial considerations. Operational factors include technology reliability, information integrity, security, privacy, vendor management and human resources. Business units, major divisions and key enterprise functions participate in risk identification and assessment, with results documented, mitigation actions assigned and ownership designated.

Risk awareness and compliance are reinforced through mandatory training for all employees at hire and annually thereafter, covering topics such as anti-money laundering, security, privacy, risk and resilience and the Code of Business Conduct and Securities Policy.

The Enterprise Risk Management group also oversees Business Continuity (BC) and disaster recovery testing. BC plans are developed based on Business Impact Analyses and address potential service disruptions. Risks identified during BC planning or through risk assessments are managed under both risk management and global crisis management procedures.

INTERNAL AUDIT

The Internal Audit function conducts ongoing operational, financial, IT and regulatory compliance audits to evaluate the effectiveness of SS&C's internal controls. Audit plans are informed by the results of the ERA, industry trends, new regulatory requirements, external audit coverage (SOC 1 reports, compliance reports, SOX), input from information security and compliance teams and Internal Audit's knowledge of the control environment.

Audit work follows Institute of Internal Auditors (IIA) standards. Reports are provided to senior management, and any issues identified are monitored through to resolution. While Internal Audit results are proprietary, significant findings and the status of corrective actions are reported to the Audit Committee.

AI GOVERNANCE

As we utilize more artificial intelligence and robotic process automation in our business and with our clients, we have built an AI governance guardrail platform called AI Gateway, which is operational as of 2025. Before sensitive information in our custody enters an LLM, we utilize AI Gateway to ensure security, compliance and policy adherence regardless of infrastructure.

This platform maintains enterprise control while allowing flexibility to rapidly adopt new capabilities. Using AI Gateway, we can switch seamlessly between models based on performance, blend multiple models for optimal results, adopt new models as they become available and maintain consistent security and compliance controls regardless of model choice.

Ethics and Reporting

INTEGRITY AND ETHICAL VALUES

SS&C's leadership believes that integrity and honesty are essential to building and maintaining an effectively controlled organization. The strength of our internal controls depends on the ethical values of the people who create, execute and monitor them.

We maintain programs and policies designed to promote and uphold integrity across the organization. These policies are published, accessible to all employees, and actively enforced. Management regularly communicates the importance of these standards to both existing employees and new hires, and all employees are required to complete annual ethics training.

CODE OF BUSINESS CONDUCT AND ETHICS

Upon hire and annually thereafter, SS&C employees complete training and attest to the Annual Certification of the Code of Business Conduct & Securities Policy. This Code provides guidance and resources for addressing ethical issues in the course of business and covers topics including:

- Compliance with laws, rules and regulations
- Conflicts of interest
- Anti-bribery, anti-corruption and anti-competition
- Insider trading
- Confidentiality and obligations to former employers
- Data security and privacy
- Honest and ethical conduct and fair dealing
- Protection and proper use of corporate assets
- Gifts and gratuities
- Accuracy of books, records and public reports
- Concerns regarding accounting or auditing matters
- Dealings with independent auditors
- Workplace health and safety

Employees must acknowledge that they have read, understood and will act in accordance with the Code as a condition of employment. The Chief Financial Officer and General Counsel oversee the Code of Business Conduct and Ethics, which is publicly available on the SS&C website.

SS&C has also adopted a *Foreign Corrupt Practices Act* (FCPA) Policy as a supplement to the Code. This policy emphasizes key provisions of the US FCPA; an anti-bribery and record-keeping statute that applies globally to SS&C, its officers and employees. The FCPA policy addresses:

- Payments to government officials or customer and supplier employees
- Cash and third-country payments
- Use of consultants, agents and representatives
- Business entertainment, gifts and travel expenses
- Books and records requirements
- Compliance procedures

MONITORING CONTROLS

Management and supervisory personnel monitor the quality of internal controls as part of routine business activities. Any exceptions are escalated to the appropriate management levels and, where necessary, to those charged with governance.

CONTROLS RELATED TO PERSONNEL

SS&C has established policies and procedures for recruiting employees, evaluating performance, taking remedial action in cases of substandard performance and addressing conduct that does not meet company guidelines.

SS&C CONFIDENTIAL AND ANONYMOUS FINANCIAL CONCERN HOTLINE

SS&C provides a facility for the reporting, investigation and resolution of complaints received regarding accounting, internal accounting controls or auditing matters. Understanding and acting upon any issues that exist regarding financial, accounting and/or audit matters is an essential component of SS&C's ability to take action and ensure the highest levels of financial fidelity. SS&C policy requires concerned individuals to send an email, submit a web form or leave a voicemail in accordance with instructions on the SS&C website.

SS&C's Chief Financial Officer and General Counsel monitor the whistleblower hotline, and all messages are investigated. SS&C internal audit verifies that such investigations were conducted.

INDEPENDENT EXTERNAL AUDITS

SS&C's financial statements are audited annually by a nationally recognized independent accounting firm, which issues an opinion on both the financial statements and the company's internal controls over financial reporting.

We also provide clients with a SOC 1 audit, performed by a nationally recognized independent accounting firm, which offers an opinion on the effectiveness of our internal controls.

SUPPLIER REQUIREMENTS

SS&C holds suppliers to the highest standards, requiring them to meet contractual obligations and comply with our rigorous evaluation and oversight processes.

Customer Engagement

OUR DEDICATED CLIENT TEAM

SS&C clients are supported by dedicated core teams with deep industry expertise and a comprehensive understanding of business needs, service requirements and evolving priorities. Each client service team reports into a business unit specializing in market segments such as wealth and traditional asset management, alternatives, insurance, banking, retirement and health solutions.

This relationship-driven structure provides:

- Senior-level leadership and robust relationship management.
- A single, accountable point of contact for service and technology.
- Direct accountability in meeting and exceeding service expectations.
- Familiarity with client processes, preferences and operations.
- Shared best practices across client service teams.
- Customized communication and reporting plans, including scheduled calls, reports, strategic reviews and product updates.

Directors and Managing Directors oversee the strategy, supervision, escalation and resource allocation for each relationship, ensuring high-level involvement and accountability. The service workforce is primarily composed of full-time professionals, with minimal reliance on contractors, to ensure consistent quality and delivery standards.

Quarterly service reviews are conducted to align on strategic initiatives, enabling proactive anticipation of client needs and continuous adaptation of the service delivery model. Clients are also kept informed about regulatory developments, technology investments and new SS&C offerings.

EACH CLIENT IS SUPPORTED BY A DEDICATED TEAM WITH DEEP INDUSTRY EXPERTISE AND A SINGLE, ACCOUNTABLE POINT OF CONTACT FOR SERVICE AND TECHNOLOGY.

TAILORED TEAM COMPOSITION FOR OPTIMAL SERVICE

Team selection is a deliberate and data-driven process. Factors considered include anticipated transaction volumes, structural complexity, delivery timelines, geographic considerations and projected future growth. This ensures that each team is optimally positioned to meet client objectives with efficiency and precision.

During due diligence and onboarding, a detailed assessment of the client's organization is conducted to assign the most qualified professionals. Team composition is strategically determined based on:

- Expected activities and transaction volumes.
- Organizational complexity.
- Timing and frequency of deliverables.
- Manager location and time zone requirements.
- Anticipated growth and scalability needs.

This approach ensures that service teams are aligned with specific client requirements and capable of delivering efficient, high-impact support.

STRATEGIC OVERSIGHT

Senior Directors and Managing Directors provide executive-level oversight to each relationship, ensuring that strategy, resource allocation and resolution of escalated matters are handled effectively and promptly.

Quarterly reviews serve as forward-looking sessions to align services with strategic growth plans. Updates are provided on relevant regulatory changes, technology upgrades and expanded service offerings. Maintaining a workforce composed predominantly of full-time employees reinforces consistency, reliability and continuity in all client engagements.

IMPROVING CLIENT OUTCOMES: ENHANCED MONITORING AND ACCOUNTABILITY

The Client Monitoring Program (CMP) adds a further layer of strategic oversight by assigning an independent senior executive sponsor to each account. This sponsor offers an additional perspective beyond the primary service team.

Action items resulting from CMP consultations are logged and tracked in SS&C's proprietary monitoring system from initiation to resolution, ensuring accountability and timely follow-up.

SS&C'S COMMITMENT TO SERVICE EXCELLENCE IS REFLECTED IN EXCEPTIONAL REVENUE RETENTION RATES:

97.1%
IN 2024

97.1%
IN LTM Q2 2025

THESE RESULTS UNDERSCORE THE STRENGTH OF SS&C'S CLIENT RELATIONSHIPS AND THE EFFECTIVENESS OF ITS PROACTIVE, RESULTS-DRIVEN SERVICE MODEL.

CONTINUOUS LEARNING FOR PROFESSIONAL EXCELLENCE

Employee development is central to maintaining high-quality client service. Through the SS&C Learning Institute, employees have access to training programs that integrate practical learning with day-to-day responsibilities. Key areas include:

- **Core business and client service skills:** Communication, project management and relationship management.
- **Technology and innovation:** Training on tools, platforms and industry technologies to deliver smarter, more efficient solutions.
- **Regulatory and compliance knowledge:** Keeping teams current with global and local regulations, reporting standards and risk management practices.
- **Process improvement and best practices:** Workflow optimization and operational excellence.
- **Leadership and professional development:** Decision-making, change management and leadership skills.
- **Collaboration and teamwork:** Cross-functional learning and shared knowledge resources to enhance collective performance.

ACCESSIBILITY OF OUR PRODUCTS AND SERVICES

SS&C is committed to website accessibility, ensuring our sites meet or exceed Web Content Accessibility Guidelines (WCAG) standards to provide an inclusive digital experience for all users.

SS&C follows a standard product development lifecycle as part of our professional services initiatives. This process includes validating that the user experience is responsive and designing to WCAG 2.0 or 2.1 guidelines, depending on the client's requirements. Our team has been building and verifying solutions that include ADA components for many years and has incorporated both the inclusion of ADA elements and the validation into our Agile development process.

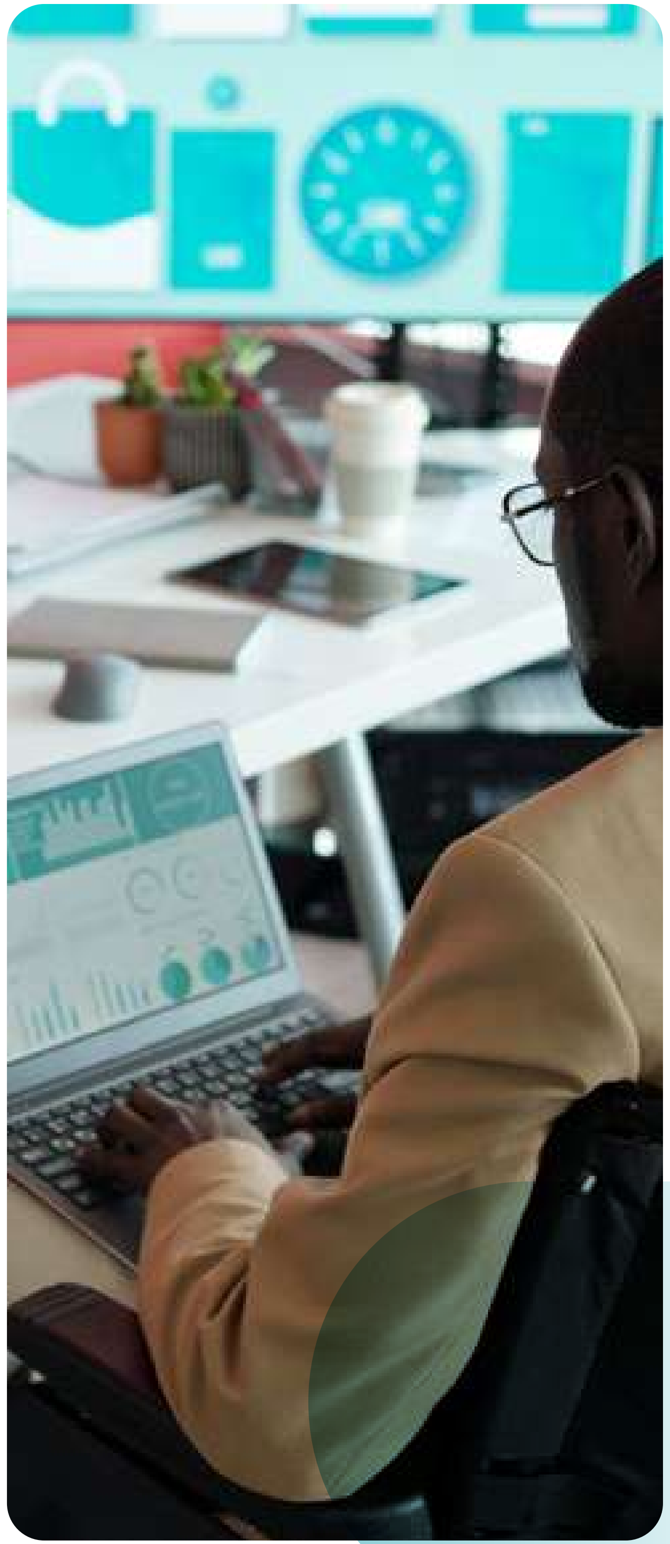
SS&C's design management system and style guide are based on W3C Web Content Accessibility Guidelines (WCAG) 2.1 AA. This includes color, typography, styles and core user interface components used across applications in both dark and light modes.

We aim to support as many of the guidelines as feasible to ensure that content is accessible by nearly everyone, regardless of disability or user device. To this end, we promote using semantic HTML/headers, alternate representations of color and form label tags to allow non-sighted users to 'scan' pages and obtain an overview of the content and data entry requirements.

Products and services which meet or exceed guidelines include

- SS&C Intralinks VDRPro web-based application (WCAG 2.1 AA).
- SS&C Global Investor and Distribution Solutions (GIDS) US solutions Digital Investor web and mobile applications (US ADA and WCAG 2.1 AA).
- SS&C GlobeOp's Fund Services Portal is undergoing updates based on our latest design management system.

We are in the process of reviewing all our products and services to ensure accessibility standards are met or exceeded.



Data Privacy and Cybersecurity

INFORMATION SECURITY

SS&C recognizes that information is a critical business asset, and our ability to operate effectively depends on safeguarding the data entrusted to us by clients, business partners and employees. This includes sensitive business, technical and personal information. As a data processor, we use client data solely to provide the services specified in contractual agreements.

We maintain a certified Information Security Management System (ISMS) aligned with global standards (ISO/IEC 27001:2022 and ISO/IEC 27002:2022), operated by our Global Information Security team under the leadership of the Global Chief Information Security Officer (CISO). The CISO provides regular updates to SS&C's Management and Board.

Access to client information is strictly limited to those with a "need-to-know" or "need-to-perform" task. Our safeguards—physical, electronic and procedural—are designed to protect against loss, misuse and unauthorized access, disclosure, alteration, or destruction.

SS&C's commitment to secure, high-quality services includes:

- Third-party audits with SOC reports and ISO certifications.
- Adherence to client contracts, corporate policies and a defined incident response plan.
- Continuous enhancement of security tools and practices.
- Compliance with applicable laws and regulatory requests.
- Ensuring service availability during business disruptions.
- Annual and ongoing security awareness training, including phishing and email security.

BUSINESS UNIT/ENTITY	CERTIFICATION(S)
SS&C Corporate and SS&C Data Centers	ISO 27001, ISO 22301 Business Continuity Management
GIDS	ISO 27001, ISO 14001 Environmental Management Systems (includes Health and Safety), ISO 22301 Business Continuity Management
Intralinks	ISO 27001, ISO 27701, ENS, TISAX
Eze	ISO 27001, ISO 27017, ISO 27018, ISO 27701
BluePrism	ISO 27001
Bluedoor	ISO 27001

DATA PROTECTION

SS&C is committed to protecting personal data and respecting individual privacy, adhering to local and international laws including:

- GDPR (UK and EU)
- Digital Operational Resilience Act (DORA) in the EU
- PIPEDA (Canada)
- CCPA as amended by CPRA (California)
- Other US state-specific privacy laws

We have adopted GDPR as our global data protection standard, supported by our Privacy Compliance Plan, which includes policies, processes and data mapping activities to meet regulatory requirements. Our Data Protection Office oversees these initiatives.

All employees complete mandatory GDPR training at hire, with annual global security and privacy awareness refreshers for all staff.

We comply with applicable data retention requirements as set by local laws, regulations and client agreements. Retention periods vary by business line and jurisdiction.

Third-party service providers—such as pricing vendors, data center operators and offsite storage facilities—are vetted to meet GDPR compliance standards and contractual commitments.

For intra-group data transfers, SS&C follows its Data Transfer Agreement, incorporating EU Standard Contractual Clauses, recognized in the Cayman Islands, the United Kingdom, Switzerland and other applicable jurisdictions.

Our Privacy Policy is publicly available at: https://www.ssctech.com/about-us/privacy

3 People and Culture

Employee Attraction and Retention

OVERALL HIRING PRACTICES AND PHILOSOPHY

As a global organization, SS&C thrives on the breadth of perspectives, skills and experiences our people bring—and we believe that the best ideas can come from anywhere. We operate on the principle that talent, performance and results are the key drivers of opportunity and advancement. By valuing everyone's unique contributions and encouraging open exchange of ideas, we create an environment where employees can learn from one another and deliver their best work.

Our hiring philosophy is built on selecting the most qualified candidates for every role, based on their capabilities, potential and alignment with our business goals. Our talent acquisition team partners closely with business leaders to source, interview, and hire individuals who demonstrate both proven skills and the capacity to grow with the organization. Once on board, employees are supported with the resources and opportunities they need to excel, ensuring that career progression is earned through performance and impact.

This approach enables SS&C to maintain a high-performing workforce, supported by long-term recruitment strategies that anticipate evolving business needs while upholding our commitment to rewarding merit and results.

TOTAL REWARDS

SS&C offers a comprehensive total rewards package designed to attract, retain and motivate top talent across our global operations. Our compensation framework combines base salary, performance-based bonuses and a variety of equity offerings, with annual merit increases tied to company, departmental, and individual performance.

Our benefits package includes health care coverage, retirement programs, life and disability insurance, wellness and employee assistance resources, flexible leave policies, tuition and professional reimbursement programs and more. Employee development is supported through continuing education, professional development programs and access to internal learning platforms.

We operate under a global hybrid work model that provides employees with flexibility in balancing work and home life, while enabling in-person collaboration for projects, workshops, onboarding events and meetings with colleagues, clients and prospects. Employees determine where and how they work, with a minimum target of six in-office days per month. Our desk hoteling model allows employees to choose both the dates and SS&C work location that best fit their schedule.

We continue to provide physical workspaces with necessary equipment at our offices for all employees.

By combining competitive compensation, robust benefits, career development opportunities and flexible work arrangements, SS&C fosters a high-performance environment that supports employees' success both personally and professionally.

WE BELIEVE THAT THE BEST IDEAS CAN COME FROM ANYWHERE—AND THAT TALENT, PERFORMANCE AND RESULTS ARE THE KEY DRIVERS OF OPPORTUNITY AND ADVANCEMENT.

SUPPORTING FAMILIES

At SS&C, we recognize that supporting employees through major life events is essential to attracting and retaining top talent. US federal law under the *Family and Medical Leave Act* (FMLA) provides up to 12 weeks of unpaid leave for eligible employees; our approach goes well beyond these requirements.

We provide up to 12 weeks of fully paid Parental Leave for all full-time employees regularly working 30 or more hours per week, applicable to the birth, adoption, or foster care placement of a child in the 12-month period following the birth, adoption or foster care placement. This benefit exceeds the finance and technology industry average of 10 weeks and may be supplemented by Short Term Disability, FMLA or any state/local family or medical leave laws.

Our policy applies equally to all eligible employees. If both parents are employed at SS&C, each may take the full benefit. Leave can be taken as a continuous 12-week period or in two-week increments during the first year after a child's arrival, offering families greater flexibility. During parental leave, employees' health coverage and other benefits remain unchanged, and SS&C supplements any state or federal wage replacement to ensure 100% of regular pay.

We also provide up to five days of paid bereavement leave for immediate family members—including spouses, domestic partners, children (including stillbirth and miscarriage), parents, siblings and grandparents—with manager discretion for additional time in cases of international travel.

Parental and family leave benefits are part of SS&C's comprehensive total rewards package, which includes competitive base pay, annual merit-based salary increases, performance bonuses, equity offerings, retirement benefits with company match, healthcare coverage, life and disability insurance, wellness and employee assistance programs, tuition reimbursement, matching gift programs and continuing education opportunities.

We complement these benefits with a global hybrid work model that offers flexibility to balance work and home life, while enabling in-person collaboration for projects, onboarding and client engagement.

By offering benefits that surpass both government requirements and industry benchmarks, SS&C reinforces its commitment to a high-performance culture that supports employees at every stage of life.

KEY HIGHLIGHTS:

12 weeks fully paid Parental Leave—two more weeks than the industry average.

Equal benefit for both parents if employed by SS&C.

Flexible leave options: continuous or in two-week increments within 12 months.

Up to five days paid bereavement leave for immediate family; additional days if international travel is required at manager's discretion.

COMPENSATION

SS&C provides a competitive, comprehensive compensation package designed to attract, retain and motivate a talented, highly skilled and performance-driven workforce across our global operations. We recognize and reward strong performance and behaviors that support our culture and business goals through annual salary reviews, promotions, variable pay such as discretionary cash bonuses or commission plans and equity awards.

Our compensation philosophy reinforces our growth strategy by emphasizing pay for performance, linking individual contributions to both corporate and shareholder success. Broad-based equity compensation aligns to employee's goals with the long-term interests of shareholders through stock price appreciation over a vesting period.

SS&C offers a discretionary annual merit increase and a discretionary bonus program, with bonuses for eligible employees awarded three times per year. We also maintain an equity program to support long-term value creation.

IN 2024:

OF EMPLOYEES RECEIVED BONUSES

OF EMPLOYEES RECEIVED EQUITY AWARDS

RETIREMENT BENEFITS (U.S.)

For our U.S.-based workforce, SS&C offers a 401(k) retirement savings plan. All regular full-time and part-time employees (excluding interns) are eligible to participate upon hire. SS&C may make a discretionary pretax matching contribution equal to 100% of the first 6% of employee contributions, up to a maximum of $8,000 annually. All matching contributions are 100% vested immediately.

MATCHING GIFTS

SS&C offers a matching gifts program for all U.S. employees. Through our matching gifts program, we provide a positive impact to the quality of life of those around us strategically and sustainably. The matching gift program supports associates' monetary contributions to their favorite tax-exempt entities by providing a dollar-for-dollar matching gift up to $10,000.

Our matching gift program provides an outlet for employee philanthropic passions and inspires opportunities corporately and individually to give back to others and bring our company values to life. Since 2022, SS&C has averaged an annual $1.2M is matching gift and grant contributions.

COMMUNITY INVOLVEMENT

In addition to SS&C's gift matching and grant contributions, we empower local teams to get involved in their respective communities. Annually, our global teams participate in over 25 local events related to charity walks and runs, food drives, green initiatives and city clean-ups, toy drives, youth mentorships and other community programs.

SS&C is a premier sponsor of Expect Miracles Foundation and a supporter of Boston Partners in Education in addition to other 501(c)(3) charities and programs.

SS&C's community garden in Kansas City donates produce to area food pantries. The garden produces thousands of pounds of fresh produce annually.

SS&C has partnered with the Arbor Day Foundation to plant a tree for every customer survey completed. Since 2020, our customers have helped plant 39,226 trees, of which 7,250 were planted in 2024. These new trees sequester an estimated 15,000+ metric tons of CO_2 over their lifetime while improving air quality, stormwater management and biodiversity. This ongoing initiative strengthens climate resilience while supporting healthier communities for generations to come.

HEALTH AND WELLNESS

With a workforce of more than 28,000 employees worldwide, SS&C is committed to supporting the physical, mental, and emotional well-being of our people beyond traditional health benefits. Our global health and wellness strategy provides programs and resources that meet the diverse needs of employees in different regions, while maintaining a consistent commitment to cultivating healthy habits and a supportive work environment.

Our programs include:

- Preventive and lifestyle health resources such as online health assessments, healthy pregnancy and healthy baby incentive programs and awareness campaigns focused on chronic conditions including diabetes and hypertension.
- Mental health and stress management support, including mindfulness training, mental health workshops for managers and access to online exercise classes.
- Physical activity benefits, including gym memberships and yoga programs. Several offices, such as our Waltham location, have fitness centers on premises with free access for all employees.

In the US, eligible employees and their spouses or domestic partners enrolled in an SS&C medical plan can access Bright Horizons, which offers tuition discounts at participating childcare centers and resources to find sitters, nannies, pet sitters, housekeepers and senior care providers.

To ensure 24/7 global support, SS&C offers a Global Employee Assistance Program (EAP) through Telus Health, available to employees and eligible family members worldwide, providing:

- Short-term, solution-focused counseling.
- Research and support services for childcare, maternity and eldercare.
- Legal consultation for family law, tenant/landlord matters, real estate and more.
- Financial consultation on budgeting, debt/credit management and estate planning.

EMPLOYEES WORLDWIDE, SS&C IS COMMITTED TO SUPPORTING THE PHYSICAL, MENTAL, AND EMOTIONAL WELL-BEING OF OUR PEOPLE BEYOND TRADITIONAL HEALTH BENEFITS.

Our global benefits philosophy is built on providing a safe, healthy and motivating work environment. We tailor benefits to regional market conditions and cultural norms to ensure competitive offerings that help attract, retain and engage employees, while managing costs responsibly for both employees and the company.

Through these initiatives, SS&C reinforces its commitment to fostering a healthy, productive and supported workforce—one that can perform at its best for our clients, our shareholders and each other.

EMERGING PROFESSIONALS PROGRAM

SS&C Technologies attracts, develops and retains early-career professionals through a comprehensive portfolio of talent programs, including internships, co-ops, apprenticeships and career-launch initiatives. These opportunities span both technical fields—such as software engineering and machine learning—and non-technical disciplines, combining hands-on, project-based assignments with mentorship from experienced teams. Interns who transition into full-time roles are supported by structured training through SS&C University, global mobility opportunities, and personalized learning resources. By integrating practical experience, professional development and long-term career pathways, SS&C builds a strong global pipeline of emerging talent and fosters lasting employee engagement.

MENTORSHIPS AND GLOBAL MOBILITY

SS&C's Succession and Mentorship Program is a global initiative designed to develop future leaders through structured, one-on-one coaching and knowledge-sharing with senior leadership. This program empowers high-potential employees to accelerate their growth, strengthen leadership capabilities and prepare for expanded responsibilities. By cultivating internal talent, we ensure a robust pipeline of qualified, engaged professionals ready to step into critical roles.

In parallel, our global mobility strategy leverages talent across geographies, aligning top performers with strategic roles in other regions. This approach supports talent retention, expands professional development opportunities and ensures the consistent delivery of high-quality service to clients worldwide by addressing skill gaps and resourcing needs across the business.

GLOBAL EMPLOYEE REFERRAL PROGRAM

SS&C views employee referrals as a key driver of recruitment success. We believe those who best understand the complexity of our work are the employees performing it at a high level. Our employee referral bonus program is designed to encourage employees to recommend qualified candidates to meet our global hiring needs, helping us attract top-tier talent while reinforcing our culture of collaboration and shared success.

BY INTEGRATING PRACTICAL EXPERIENCE, PROFESSIONAL DEVELOPMENT AND LONG-TERM CAREER PATHWAYS, SS&C BUILDS A STRONG GLOBAL PIPELINE OF EMERGING TALENT AND FOSTERS LASTING EMPLOYEE ENGAGEMENT.

Learning and Development

Our ability to attract, develop, deploy and retain the best global talent is critical to sustaining our customer-centered reputation in the health and wealth industries. As more individuals choose to work for organizations that align with their values, SS&C remains committed to empowering employees to grow their skills, broaden their perspectives and make an impact both at work and in their communities.

While job-specific training is essential, SS&C's Learning and Development (L&D) initiatives go far beyond foundational skills. We provide financial support for continuing education, resources for professional growth, leadership development programs and opportunities to build both technical and non-technical capabilities through formal and informal learning channels.

INVESTING IN OUR MOST VALUABLE ASSET—OUR PEOPLE

Every year, SS&C invests approximately $6 million globally in employee training and development. Our dedicated Learning and Development team delivers training across financial markets, professional skills, applications and technical disciplines through computer-based, virtual and in-person learning. Using internal resources, our workforce completed an average of 12 hours of training per employee with additional supplemental training as determined by each business unit.

ENHANCING OUR WORKFORCE THROUGH TECHNOLOGY TRAINING

Technology is a core strength at SS&C, and we are committed to keeping our employees ahead of the curve. We partner with leading providers—including O'Reilly Learning—to offer access to industry-best technical training and certifications. These programs support our continuous innovation, enabling us to expand service offerings, enhance product capabilities and meet the evolving needs of our clients.

GAINING AN EDGE THROUGH OUR IN-HOUSE LEARNING PLATFORM

The SS&C Learning Institute is our proprietary learning management system (LMS) for administering, tracking, reporting, automating and delivering education and training programs. The platform hosts both SS&C—developed content and the GAMMA library of online courses and tests offering continuing education credits.

In 2024, we increased the number of available learning programs by 17%, to 4,559 courses, spanning topics from financial markets to professional development and technical training. All SS&C employees accessed the platform throughout the year to complete mandatory training and other assigned courses. Employees can choose from online courses and tests, videos, articles and instructor-led sessions, with 98% of all courses rated excellent or above average; a 1% increase since 2023.

Our Intern and Launch Program supports SS&C's commitment to our workforce by fostering early-career talent. Through hands-on experience, mentorship and sustainable program design, we prepare future leaders to drive innovation and long-term organizational growth.

$6M+
INVESTED IN EMPLOYEE TRAINING AND DEVELOPMENT

4,559
COURSES

12 hours
TRAINING PER EMPLOYEE

BUILDING OUR LEADERSHIP PIPELINE THROUGH THE TOP TALENT PROGRAM

People development is essential to delivering our strategy, and the quality of talent across SS&C is fundamental to our growth and success. Our Top Talent Program annually recognizes the top 2% of performers within each division, with approximately 550 participants in the 2024 cohort.

These high performers consistently exceed expectations, demonstrate behaviors that exemplify SS&C's culture and values, and show strong potential for continued growth. Participants are paired with senior management mentors for regular in-person or virtual coaching and are invited to exclusive networking and knowledge-sharing events. Program satisfaction is high, with 95% of participants rating the mentoring, coaching and networking experiences as excellent or above average.

DEVELOPING LEADERS AT EVERY LEVEL

Our leadership development framework equips managers at all levels to inspire their teams, deliver strong results and contribute to organizational transformation. In 2024, we expanded our in-house leadership program to include four tiers:

- Aspiring Leaders—employees on track to move into management.
- License to Lead—for new managers.
- Developing Your Leadership—for middle management.
- Outstanding Leaders—for senior leadership.

Participation has tripled since 2023, with approximately 3,400 employees enrolled in 2024. Ninety-eight percent% of participants rated the programs above average; a 4% increase from the previous year.

CONTINUOUS LEARNING AND LEARNING PATHS

We foster a culture of continuous learning, starting with comprehensive new-hire onboarding and reinforced through annual mandatory training. Our 74 learning paths, including a dedicated professional development path, support employees at every stage of their careers. These paths span financial, technical, application and professional skill-building, aligning individual growth with SS&C's evolving business needs.

Individual business units also offer targeted learning and development programs.

3,400
EMPLOYEES ENROLLED IN LEADERSHIP PROGRAMS IN 2024

98%
OF PARTICIPANTS RATED THE PROGRAMS ABOVE AVERAGE

74
LEARNING PATHS

Workforce Representation and Talent Access

STRATEGY

SS&C believes the wide range of skills, experiences and backgrounds of its employees, officers and directors are important to its success.

As such, we have defined three key areas of focus:

- Recruitment and retention
- Leadership
- Employee engagement

These areas are underpinned by a set of objectives for focus of activity over upcoming years:

- Talent acquisition and retention: Review recruitment processes to attract talent with a wide range of skills and experiences.
- Employee Resource Groups (ERGs): Create opportunities for employees to engage in open dialogue across ERG groups to ensure cross-company collaboration.
- Education and training: Continue to offer existing training programs to facilitate growth in skills and experiences.

SS&C seeks to leverage the wide range of our employees' skills and experiences to drive profitability and increased shareholder value. This requires continuous effort, commitment and learning. SS&C recognizes our strategy will require constant review and adaptation to ensure it fits our organizations' unique needs.

Our approach focuses on broadening sourcing strategies and strengthening outreach to underrepresented and untapped talent pools, including veterans, career returners, geographically diverse candidates and individuals from non-traditional career paths.

This strategy allows SS&C to continue building a high-performing, future-ready workforce while ensuring compliance with evolving regulations. SS&C HR will continue to lead this initiative.

EMPLOYEE RESOURCE GROUPS

Employee Resource Groups (ERGs) at SS&C are voluntary, employee-led groups that bring together employees with shared experiences or interests.

The purpose of ERGs at SS&C is to foster a sense of belonging, provide networking opportunities and support growth of skills and experiences for their members. They are open to all employees who wish to contribute to the network within each business subsidiary. ERGs at SS&C recognize the intersectionality across multiple groups and collaborate with one another to promote and facilitate cross-ERG inclusion.

There are ERGs across multiple business subsidiaries representing groups such as: Asians at Eze, BlackIN and Black Employee Network (BEN), Hispanic/Latinx Organization for Leadership and Achievement, PRIDE and PrideIN, Parents, Seven for Veterans, The Network, Giving Back Group, Women of Intralinks and Women in Automation.

ERGs are intended to facilitate opportunities for all employees across all business units to join and drive greater cross-company collaboration.

ATTRACTING AND RETAINING TALENT FROM A BROAD RANGE OF BACKGROUNDS

As an equal opportunity employer, SS&C recruits top talent from a wide variety of sources to ensure a strong, future-ready pipeline of candidates with the evolving skills and experiences needed across all levels of the organization. Our sourcing strategy includes partnerships with other networks that expand access to qualified candidates from a variety of backgrounds.

Globally, we support employee development and engagement through initiatives such as ERGs, mentorship, leadership development, succession planning and rising star programs. We invest more than $6 million annually in training and professional development to help employees advance their skills and careers.

THE PURPOSE OF ERGS AT SS&C IS TO FOSTER A SENSE OF BELONGING, PROVIDE NETWORKING OPPORTUNITIES, AND SUPPORT GROWTH OF SKILLS AND EXPERIENCES FOR THEIR MEMBERS.

POLICIES AND PROCEDURES

SS&C is committed to maintaining a safe and secure work environment for all our employees that is free from all forms of harassment, discrimination and retaliation. We pursue our business objectives with integrity, trust and respect and operate in full compliance of all applicable laws and regulations. SS&C has an anti-harassment policy in place. In support of our commitment, we require all employees to complete a mandatory online workplace harassment compliance training course designed to increase awareness and knowledge of applicable laws to prevent sexual and all forms of harassment. This training is specific to employees in the US.

We have a defined whistleblowing process available here.

4 Environmental Awareness

SS&C works to support environmentally responsible initiatives across its global locations that not only benefit local and regional resources but also those of our clients and their customers. We are mindful of our effect on the environment for both consumers and producers.

We recognize that environmental and climate change reporting is an important aspect of our overall Corporate Responsibility reporting and disclosure. While we don't currently have a global program to track our emissions, we measure energy use for all our businesses, and some regions and business units are further along in the GHG emissions tracking than others.

Energy, GHG and Climate

SS&C GIDS UK & Ireland Emissions Initiatives

We are monitoring evolving mandates and regulations around climate disclosures and continue to release information as relevant requirements are finalized. SS&C GIDS UK and Ireland are working towards net-zero by 2035.

Energy usage data is measured to provide our emission data and, in compliance with the Streamlined Energy and Carbon Reporting regulations ('SECR'), that data is analyzed and verified by a third party. Through energy saving initiatives laid out in our 2025 GIDS UK ESG Statement, we have shown a year-on-year reduction in our emissions. Where we contract directly with utility providers, electricity is certified 100% renewable.

A Business Carbon Assessment ('BCA') was initiated in 2023 (using 2022 data) to help calculate our overall emissions, including scopes 1, 2 and 3. The BCA was audited in 2024, and we are now commencing our second audit.

Scope 3 emissions for products and services is complicated to ascertain as the industry standard may not accurately reflect a company's emissions, so we now engage with our top 10 suppliers each year asking them to complete a questionnaire providing their emission data. This is then calculated to provide our scope 3 emissions in a more measured way.

A copy of the latest SS&C GIDS UK and Ireland ESG statement including our scope 1, 2 and 3 emissions can be found here.

Data Centers

In our 2023 report, we committed to continued investment in cloud technology to further reduce our real estate footprint by consolidating and reducing data centers. Additionally, we planned to add new technology in cooling of cloud pod environments wherever possible and exploring the use of water cooling at the rack level.

In a major step toward our sustainability and operational excellence goals, we completed a strategic server modernization project across five key datacenters. This effort involved decommissioning 600 legacy servers and replacing them with 250 high-density, energy-efficient systems.

This effort resulted in a 600 kW reduction in total power consumption, contributing significantly to our carbon footprint reduction efforts. Beyond the raw energy savings, the upgrade improved compute density, enabling more workloads to run with fewer physical systems—translating into reduced cooling requirements, lower maintenance overhead and greater scalability for future needs.

As part of our ongoing commitment to operational efficiency and environmental sustainability, we have successfully closed and consolidated workloads from two legacy data centers into larger, more efficient facilities. This initiative has enabled us to optimize resource utilization and take advantage of high-density infrastructure, leading to a net reduction in both power and cooling demands.

Building on this success, we are now targeting the closure of an additional four data centers, which will further streamline our operations and contribute to our energy reduction goals. This next phase of consolidation is expected to yield significant power savings, lower carbon emissions and enhanced operational efficiencies—all while maintaining or improving service levels.

These actions reflect a broader strategic shift toward a leaner, more sustainable IT footprint, aligning infrastructure growth with our long-term Corporate Responsibility objectives and positioning us to scale responsibly as business needs evolve.

Environmental Initiatives

FACILITIES, TECHNOLOGY, PROCUREMENT AND TRANSPORTATION

SS&C operates from offices housed in some of the world's most sustainable buildings, certified under leading global frameworks such as LEED (US), BREEAM (UK), Green Star and NABERS (Australia), Green Mark (Singapore) and IGBC (India). We are proud to work in buildings that are internationally recognized for energy efficiency, sustainability and workplace health.

Over 20 office locations have achieved these certifications.

We maintain our commitment to efficient energy management systems, power conservation technologies, water conservation with "low flow" plumbing fixtures, elevator modernization and lighting strategies help reduce overall electrical usage.

CORPORATE RECYCLING

Through our corporate recycling program, we continue to reduce the volume of trash sent to landfills. A robust recycling program is one of the most significant steps a company can take to reduce its environmental impact. SS&C's Asset Disposal Policy facilitates the recycling or reuse of excess materials.

ELIMINATING PAPER

We heavily invest in deploying software and automated solutions to reduce paper-based equivalents. Many of our offices have transitioned to paperless work areas, and we encourage our employees to limit their use of printed materials. SS&C provides documentation delivery options to customers to help reduce paper consumption.

Our e-Investor platform evidences one example of SS&C's technological development of environmentally sustainable products. E-Investor transforms the capital activity process, allowing investors to digitally complete, execute and submit their transaction (i.e., subscription, redemption, transfer), including supporting documentation, in a wholly electronic format.

5 Appendices

SS&C Key Corporate Responsibility Metrics

SECTION	METRIC	FIGURE	PAGE
Governance	Board members independence	7/8	07
Governance	Average Board tenure	14 years	07
Governance	Meeting schedule	At least once per fiscal quarter	08
Governance	Executive pay metrics	50% Performance stock units 25% Restricted stock units 25% Stock options	08
Customer Engagement	SS&C historic revenue retention rate	~97%	13
L&D	Global investment in training and development	~$6 million	23
L&D	Average hours of learning per person	12 hours	23
L&D	Number of programs available through the Learning Institute	4,559	23
L&D	Employees with access to programs	28,000	21
L&D	Learning Institute courses rated excellent or above average	98%	24
L&D	Satisfaction rating from participants involved in mentoring, coaching, networking and other program initiatives.	95%	24
L&D	Participants in leadership development training	3,400	24
L&D	Participants rating Leadership training rated above average	98%	24
L&D	Learning and professional development paths offered	74	24
Employee Attraction and Retention	Percentage of employees receiving bonuses	80%	20
Employee Attraction and Retention	Percentage of employees receiving equity	66%	20

Relevant SASB Metrics

TOPIC	SASB CODE	METRIC	SS&C METRIC
Data Privacy & Freedom of Expression	TC-SI-220a.1	Description of policies and practices relating to targeted advertising and user privacy	"SS&C is committed to protecting personal data and respecting individual privacy, adhering to local and international laws…" (page 16)
	TC-SI-220a.2	Number of users whose information is used for secondary purposes	"As a data processor, we use client data solely to provide the services specified in contractual agreements." (page 15)
	TC-SI-220a.3	Total amount of monetary losses as a result of legal proceedings associated with user privacy	Please refer to our most recent 10-K for any information related to this topic.
	TC-SI-220a.4	(1) Number of law enforcement requests for user information, (2) number of users whose information was requested, (3) percentage resulting in disclosure	Please refer to our most recent 10-K for any information related to this topic.
	TC-SI-220a.5	List of countries where core products or services are subject to government-required monitoring, blocking, content filtering or censoring	Please refer to our most recent 10-K for any information related to this topic.
Data Security	TC-SI-230a.1	(1) Number of data breaches, (2) percentage that are personal data breaches, (3) number of users affected	Please refer to our most recent 10-K for any information related to this topic.
	TC-SI-230a.2	Description of approach to identifying and addressing data security risks, including use of third-party cybersecurity standards	"We have adopted GDPR as our global data protection standard, supported by our Privacy Compliance Plan, which includes policies, processes and data mapping activities to meet regulatory requirements. Our Data Protection Office oversees these initiatives." (page 16)

TOPIC	SASB CODE	METRIC	SS&C METRIC
Environmental Footprint of Hardware Infrastructure	TC-SI-130a.1	(1) Total energy consumed, (2) percentage grid electricity, (3) percentage renewable	Please refer to our most recent 10-K for any information related to this topic.
	TC-SI-130a.2	(1) Total water withdrawn, (2) total water consumed, percentage of each in regions with High or Extremely High Baseline Water Stress	Please refer to our most recent 10-K for any information related to this topic.
	TC-SI-130a.3	Discussion of the integration of environmental considerations into strategic planning for data center needs	Please refer to the Data Centers section (page 29)
Intellectual Property Protection & Competitive Behavior	TC-SI-520a.1	Total amount of monetary losses as a result of legal proceedings associated with anti-competitive behavior regulations	Please refer to our most recent 10-K for any information related to this topic.
Managing Systemic Risks from Technology Disruptions	TC-SI-550a.1	Number of (1) performance issues and (2) service disruptions; (3) total customer downtime	Please refer to our most recent 10-K for any information related to this topic.
	TC-SI-550a.2	Description of business continuity risks related to disruptions of operations	Please see Risk Management section (page 09)