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SS&C Redefines Reporting and Client Communications in the Black Diamond® Wealth Platform

WINDSOR, Conn., Feb. 10, 2016 /CNW/ -- SS&C Technologies Holdings, Inc. (Nasdaq: SSNC), a global provider of financial services software and software-enabled services, today announced that it has significantly advanced the reporting and client communications experience within the third generation of the Black Diamond® wealth platform.

Initially announced at our annual conference in June 2015, the Black Diamond® wealth platform now delivers a new configurable and dynamic reporting and presentation experience, advancing client communication tools with a redefined approach to dynamic reporting and digitally enabled client meeting presentations.

"Over 750 advisors and wealth managers rely on Black Diamond® every day to provide their clients with a comprehensive wealth view that focuses on progress to long-term goals and clarity on how the advisor is protecting and building wealth. The new Black Diamond wealth platform, nicknamed 'BD3', aims to empower the advisor to tell their story through reporting and digital content that encompasses total net worth, income generation, planning, and goal setting," said Dave Welling, Senior Vice President and Managing Director of SS&C's Advent's Advisory Market Group. "The new capabilities help advisors demonstrate the value they are adding and to engage in meaningful dialogue with their clients."

Revamped Reporting Experience

Brand new reports were created to complement the modern appearance, flexibility, and customization of the reports that over 10,000 investors enjoy in the Black Diamond® Investor Experience. Advanced reporting on fixed income and alternative investments, projected income reporting, and net worth reporting have also been released in the new platform. The upgraded functionality offers several new features designed to help advisors interact better with their clients, including a new home page view for dynamic reporting, featuring a dashboard of content that is completely configured to their preferences.

For firms that prefer a self-service option, a re-invented report builder was developed for advisor-driven report creation, while Black Diamond reporting consultants continue to offer dedicated services to engage with clients and provide best practices on report design and delivery. Existing clients will participate in a staged rollout to transition to the new platform's reporting capabilities.

Presentation Mode Streamlines Client Meeting Preparation

Presentation mode allows advisors to combine both Black Diamond® data and outside content from other systems into a dynamic presentation. Meeting agendas, market commentaries, financial plans, and other files are now displayed in one, sleek presentation that is securely saved, notated, and time-stamped into a client's history for future access. Conceived to reduce the time needed to prepare for meetings and to enable advisors to deliver presentations dynamically, it empowers advisors to tailor presentations to clients based on the specific meeting agenda and to drill-down into data to answer questions on the fly, helping them to engage in more interactive discussions with clients.

Commenting on the new functionality, David, Stalnaker, President and Chief Investment Officer at Symmetry Capital Advisors LLC says, "The new Black Diamond® wealth platform makes it really easy to prepare for client meetings. We can use 'presentation' mode to bring together reports, slides, market summaries, and other files when we need them. It provides huge benefits and takes away the stress and scramble that's usually associated with preparing for last-minute client meetings."

Now in its third generation, Black Diamond® has evolved into a holistic, cloud-based wealth platform combining portfolio management, reporting, client communications, and rebalancing - all backed by proactive, advisor-centric service designed to help advisors achieve their goals. Last year, SS&C Advent released a completely revamped Investor Experience with client portal, vault, and communications tools to help advisors engage better with clients. The new functionality announced today supports not only the advisor-client relationship, but also helps advisors improve productivity.

About SS&C Technologies
SS&C is a global provider of investment and financial software-enabled services and software for the global financial services industry. Founded in 1986, SS&C is headquartered in Windsor, Connecticut and has offices around the world. Some 10,000 financial services organizations, from the world's largest institutions to local firms, manage and account for their investments using SS&C's products and services. These clients manage an aggregate of over $44 trillion in assets.

Additional information about SS&C (NASDAQ: SSNC) is available at www.ssctech.com.

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