SS&C Announces Upcoming Integrations for Black Diamond Client Experience Portal

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More than 80% of advisor clients adopt latest customer interaction features

WINDSOR, Conn., Sept. 17, 2019 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced that several wealth management technology providers will integrate with the Relationship Timeline feature in Black Diamond's Client Experience (CX) portal. The CX portal is a cloud-based platform that allows advisors to maintain a collaborative dialogue with clients.

Relationship Timeline will actively integrate with SS&C Salentica, RightCapital, SMArtX, Redtail Technology, Asset-Map, Riskalyze and LifeYield. Since CX launched in May 2018, more than 80% of Black Diamond users have adopted the latest advanced client interaction features, which now includes the Relationship Timeline. This unique and interactive feature became broadly available in August and enables advisors to easily communicate opportunities and milestones in the context of the client's financial journey.

Platform integration partner, RightCapital, co-founder and CEO Shuang Chen said, "Advisory firms are looking to transform the way they connect with their customers. By integrating with the Relationship Timeline feature, advisors can easily highlight the achievement of an investor's short- or long-term financial goals as well as the steps that may still be necessary to realize those dreams."

Long-time Black Diamond client, Brian Boughner, Principal at Parallel Financial commented, "The Black Diamond Client Experience has been a game changer for our firm when interacting with clients. Having a branded app for our clients not only brings increased credibility, but it also increases their trust in us by providing complete transparency."

Robert Roley, Senior V.P. and General Manager of SS&C Advent said, "Technology integration and open architecture enable advisors to structure the client experience in a way that suits their clients best. We're encouraged to see a growing number of advisors focused on enhancing their clients' experience, and we're excited to partner with the key providers in this space to make the Black Diamond Client Experience portal even more accessible."

These new integrations will allow advisors to incorporate content from their technology stack into an easy-to-follow digital web feed. Upcoming features will be unveiled during the **SS&C Deliver** session "Modernize the Advisor-Investor Dialogue."

About SS&C Technologies
SS&C is a global provider of investment and financial services and software for the financial services and healthcare industries. Founded in 1986, SS&C is headquartered in Windsor, Connecticut and has offices around the world. Some 18,000 financial services and healthcare organizations, from the world's largest institutions to local firms, manage and account for their investments using SS&C's products and services.

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

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