



NEWS RELEASE

Crystal Capital Partners Chooses SS&C to Optimize Operations

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WINDSOR, Conn., June 26, 2023 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced Crystal Capital Partners, a leading turnkey alternative investment platform for financial advisors, has selected SS&C to further optimize its back-office processes.

Crystal Capital Partners' platform enables advisors and their qualified purchaser clients to build diversified portfolios comprised of institutional private funds. Last year, they achieved annualized AUM growth of 20% and 32% growth in new advisory relationships. Crystal's platform currently connects over 200 wealth management firms to approximately 60 third-party institutional funds which manage over \$1.5 trillion in assets¹. **SS&C Geneva** will streamline portfolio management and reporting across more than 500 customized portfolios and support further growth.

Investors are increasingly turning to alternative investments while reducing their traditional holdings. According to a **report by PWC**, alternative investments share of global assets under management is expected to reach 15%, or \$21.1 trillion by 2025, a near doubling of the asset base since 2020. Crystal, with nearly 30 years of industry experience, is well-positioned to service this increased interest and expects to scale to over 5,000 portfolios over the next five years.

"The best alternative investment platforms offer diversification across strategies and allow entrepreneurial advisors to zero in on specific goals, beyond cookie cutter solutions. Our integration with SS&C will help streamline the investing process for advisors and their clients, eliminating much of the burdensome operational processes

associated with alternative investments —subscriptions, rebalancing, and liquidity schedules, among other things," said Michael Hoyer, Chief Financial Officer, Crystal Capital Partners. "As a result, advisors can focus more time on educating their clients about the breadth of the asset class and how it can be deployed in a modern portfolio."

"We are excited to support Crystal Capital Partners in their efforts to bring efficiencies to alternatives investing," said Karen Geiger, Co-General Manager, SS&C Advent. "As a leading fund services and technology provider with over 35 years in the business, we specialize in finding solutions to fit every platform's needs. We look forward to helping Crystal Capital optimize operational workflows on their platform, so their member advisors can focus on client relationships and generating investment returns."

¹ Source: Crystal Capital Partners, data as of June 1, 2023.

About Crystal Capital Partners

Crystal Capital Partners is a turn-key alternative investment platform, providing financial advisors with exposure to third-party institutional private market and hedge funds for their clients' portfolios. Crystal's clients include independent advisors, regional banks, IBDs, and multi-family offices. Crystal is a Registered Investment Advisor headquartered in Miami, Florida. Learn more here: <https://www.crystalfunds.com/press-disclaimer>

About SS&C Technologies

SS&C is a global provider of 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 20,000 financial services and healthcare organizations, from the world's largest companies to small and mid-market firms, rely on SS&C for expertise, scale and technology.

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

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