



NEWS RELEASE

SS&C Black Diamond Expands Financial Planning Application with eMoney Integration

2025-11-18

WINDSOR, Conn.--(BUSINESS WIRE)-- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced **SS&C Black Diamond® Wealth Solutions** has integrated with **eMoney Advisor**, a leading provider of financial planning software. The integration empowers advisors to deliver a personalized, data-driven financial planning experience without switching between platforms.

Advisors can directly link multiple eMoney financial plans to a single Black Diamond relationship, getting a unified view of each client's financial picture. Data syncing between eMoney plans, Black Diamond's Client Portal and SS&C's Financial Planning application is seamless. Users gain greater flexibility and insight without toggling between systems, simplifying daily operations and saving valuable time. Nearly 400 firms using both Black Diamond and eMoney will benefit from the enhanced integration.

Key Features Include:

- Multiple Plans Per Relationship: Link multiple eMoney plans to a household within Black Diamond.
- Client Visibility Controls: Designate "Active" plans to display in Client View and the Client Experience Portal.
- Unified Advisor Dashboard: Filter and sort plans by relationship, goals and probability of success in one place.
- Streamlined Setup: Easily authenticate using eMoney credentials and start linking plans immediately.

"This integration is a game-changer for advisory firms relying on both Black Diamond and eMoney," said **Steve Leivent**, Co-General Manager of SS&C Wealth & Investment Technologies. "The simplified advisor

workflow strengthens data consistency and supports deeper, more informed client conversations."

"The two-way eMoney integration with Black Diamond streamlines a key workflow — keeping financial plans current and consistent," said **Kelly Reagan, CFP®, Vice President & Financial Planner, Girard, a Univest Wealth Division**. "Team members and clients can connect multiple plans to one relationship and view them within Black Diamond, which helps us build deeper client relationships and strengthens every conversation."

"At eMoney, we're committed to helping advisors deliver seamless, collaborative planning experiences," said **Ricky Illigasch, V.P., Product Management, eMoney**. "Our new two-way integration with Black Diamond makes it easier for firms to unify their technology, reducing manual effort and keeping financial planning at the center of client relationships."

Black Diamond Wealth Solutions continues to deliver advisor-first innovation through a unified technology ecosystem. The two-way integration with eMoney is the latest of many enhancements to Black Diamond's Financial Planning application and Client Portal, which already offer a vast ecosystem of best-in-class integrations with third parties such as RightCapital, FutureCapital, Morningstar Direct Advisory Suite, and more.

About eMoney Advisor, LLC

eMoney Advisor, LLC ("eMoney") provides technology solutions and services that help people talk about money. Rooted in holistic financial planning, eMoney solutions strengthen client relationships, streamline business operations, enhance business development, and drive overall growth. More than 138,000 financial professionals across firms of all sizes use the eMoney platform to serve more than 7 million households throughout the U.S. For more information, please visit: emoneyadvisor.com.

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. More than 23,000 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.

SOURCE: SS&C

Additional information about

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

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