



NEWS RELEASE

SS&C Introduces AI Agents to Simplify Financial Services and Healthcare Operations

2025-10-28

Proven, prebuilt AI agents from a leader in responsible AI governance enable first adopter, American Life & Security Corp., to streamline private credit operations

WINDSOR, Conn.--(BUSINESS WIRE)-- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced the launch of its **AI agent catalogue** for financial services and healthcare firms. The outcome-focused AI agents are designed to simplify complex operations such as credit processing and contract validation. Delivered as a managed service, the agents help organizations overcome talent shortages and operational bottlenecks securely and at-scale.

One of the first customers to evaluate an SS&C AI Agent is **American Life**, a rapidly growing carrier in the annuity and retirement space based in Lincoln, Nebraska. The firm is leveraging and evaluating SS&C's **Credit Agreement Document Agent** to streamline processing within its private credit operations. The AI agent continuously reviews and updates lengthy loan documents, cutting time and errors associated with manual review. SS&C saw a **significant reduction in credit processing times** within internal operations by using the technology.

"SS&C's AI agent offering stood out due to its successful implementation within the firm's own operations," said **Georgette Nicholas, CEO, American Life**. "The ability to update credit agreements almost in real time will be transformative allowing our team to focus on higher-value work instead of manual upkeep. This adoption reinforces our commitment to advancing innovation within the annuity and retirement sector."

Built on **SS&C AI Gateway**, the company's enterprise-grade AI governance platform, each agent is developed, tested, and deployed within SS&C's own operations before being released to customers, ensuring proven performance, compliance, and measurable ROI.

"Intelligent automation and AI have been transformation enablers for our organization, introducing new levels of business and revenue growth at speed and scale," said **Rob Stone, General Manager, Intelligent Automation & Analytics at SS&C**. "As Customer Zero, we understood the need for tried and tested purpose-built solutions backed by strong governance and experienced support. With this offering, we are aiming to enable our customers to realize value from agentic AI safely, securely and quickly."

The **SS&C AI Gateway** provides secure, auditable, and compliant access to large language models (LLMs). The gateway employs real-time guardrails for advanced security and data loss protection, real-time risk monitoring, and explainability of actions. SS&C offers a range of deployment options, including hosting the AI Agents and AI Gateway on privately owned GPU infrastructure in ISO-compliant data centers, ensuring full custody of client data.

SS&C also offers Agent Services for custom-built AI agent solutions to support individual customers' specific requirements. Beyond credit processing, SS&C's AI Agent Catalogue includes agents designed for contract analysis, trade reconciliation and validation, invoice processing, and other common yet complex operational workflows. Each agent can be deployed as-is or customized through **SS&C Agent Services**, which enables clients to design and train agents tailored to their specific business needs.

Learn more about SS&C's Agentic Automation solutions **here**.

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.

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

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Source: SS&C