



NEWS RELEASE

SS&C Launches Global Contact Center Platform to Enhance Client Engagement

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WINDSOR, Conn., July 9, 2024 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced its new Contact Center platform to help asset management, life and pensions and retirement sectors modernize and elevate the customer experience.

The global customer communications platform enables SS&C's clients to deliver personalized customer experiences 24/7.

The single global platform for customer communications enables SS&C's Contact Center clients to deliver personalized experiences to their customers around the clock. In addition to voice, email and secure messaging, investment managers can leverage intelligent automation technologies to access customer information instantly and provide exceptional experiences across products and geographies.

"Delivering a world-class, consistent, personalized experience to customers is a top priority for our firm," said Mike Sharkey, President of DWS Service Company, a client for over 35 years. "As a leading transfer agent and investor service provider, SS&C has been a great partner in helping us enhance client service. We are excited to embark on this modernization project to help us deliver secure, personalized client experiences at scale."

The Contact Center platform features several AI chatbot capabilities and speech analytics to further enhance self-service capabilities. Multi-channel support with voice, email, chatbot, and AI-enabled intelligent virtual assistants is available on a fully outsourced or platform basis. Over the next 18 months, SS&C will be introducing:

- Advanced use of intelligent virtual assistants, enabling firms to deal with multiple requests to reduce waiting time
- Improved fraud detection, including biometrics, spectro-temporal audio analysis and detection of AI/synthesized voices and device spoofing detection
- Improved analytics around customer sentiment in speech and text to predict escalation patterns
- Co-pilot solutions to better feed knowledge to agents and training solutions to help improve service.

SS&C Global Investor & Distribution Solutions has grown to provide contact center services to more than 150 clients across investment management, superannuation, brokerage and other entities. SS&C has handled more than 3 million calls on behalf of its clients, leveraging more than 1,000 agents worldwide.

"As a leader in transfer agency and investor servicing, we want to ensure we provide our client's customers with a world-class experience, one interaction at a time, 24/7," said Nick Wright, Global Head of SS&C Global Investor & Distribution Solutions. "By investing in a global contact program, we aim to bring clarity, convenience and coverage to our clients' Contact Center programs and make customer contact personal at scale."

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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