



## NEWS RELEASE

# SS&C Signs Agreement with Insignia Financial

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WINDSOR, Conn., Dec. 9, 2024 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced an initial agreement with Insignia Financial (Insignia) to deliver superannuation member administration services. Insignia Financial supports around 1.1 million superannuation fund members through its wealth management offerings.

Upon signing a final binding agreement, more than 1,000 team members in seven offices across Australia will transfer from Insignia to SS&C. The team will then leverage SS&C's in-house technology to automate processes and streamline operations while providing top-notch service delivery to Insignia's customers alongside SS&C's experts.

"As a leading global provider of retirement solutions, SS&C is a trusted partner with extensive expertise in fund administration. We anticipate the collaboration with SS&C will provide our more than 1.1 million members with an improved experience delivered by contemporary technology, our people with the opportunity to be part of a large global enterprise, and greater cost efficiencies," said Insignia Financial's CEO Scott Hartley.

"We look forward to welcoming Insignia Financial staff to the team and working closely with our new colleagues," said Bill Stone, Chairman and CEO. "Insignia Financial is one of the largest wealth management businesses in Australia and will be our largest client in Australia. This collaboration will put SS&C one step closer to becoming the leading superannuation administration provider in the region. As more funds look to partner with trusted external providers, we look forward to delivering the best technology and service to optimize superannuation administration for Australia's investors."

## About Insignia Financial Ltd.

With origins dating back to 1846, today the Insignia Financial is a leading Australian wealth manager. Insignia Financial provides financial advice, superannuation, wrap platforms and asset management services to members, financial advisers and corporate employers. Further information about Insignia Financial can be found at [www.insigniafinancial.com.au](http://www.insigniafinancial.com.au)

## About SS&C

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](http://www.ssctech.com).

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