



NEWS RELEASE

SS&C Technologies Adds Investment Management Services to Black Diamond Wealth Platform

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WINDSOR, Conn.--(BUSINESS WIRE)-- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced the addition of **Black Diamond Investment Management Services**—a suite of integrated capabilities designed to transform how wealth management firms streamline portfolio management, trading, and client engagement. More than 2,700 firms use the cloud-native SS&C Black Diamond® Wealth Platform to meet complex needs of modern advisors.

“The launch of Investment Management Services reinforces SS&C’s mission to support advisors with flexible, powerful tools to elevate client outcomes,” said Steve Leivent, Senior V.P. and Co-General Manager of SS&C Wealth & Investment Technologies. “By embedding these capabilities into a single, unified platform, we empower advisors to spend more time building relationships—and less time managing operational tasks.”

Key highlights of Black Diamond Investment Management Services include:

- **Managed Account Services:** turnkey solution enables advisors to outsource trading, rebalancing and portfolio oversight directly from the Black Diamond platform. Powered by SS&C ALPS Advisors, the workflow solution gives direct access to expert-driven strategies and simplifies operational complexity to enable firms to scale.
- **Model Marketplace:** curated access to a wide selection of portfolio models—including those from SS&C ALPS Advisors and third-party managers—supporting both proprietary and outsourced investment approaches.
- **Proposal Generation:** automated and intuitive tools for building investment proposals improve client communication and accelerate onboarding.

- Human-Centered Investing: tailored household-level rebalancing and tax-aware optimization align portfolios with clients' unique goals, constraints, and risk profiles.

"Partnering with the team at SS&C has elevated the experience we're able to deliver to our clients. The seamless integration, collaborative innovation and support, and turnkey access to model portfolios have simplified our operations and empowered us to scale with confidence," said Dr. Forrest Bryant, CEO, High Speed Alliance, LLC, a registered investment advisor and long-time Black Diamond Wealth Platform user.

Learn more about Black Diamond Investment Management Services [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 22,000 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.sscotech.com.

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