



NEWS RELEASE

SS&C Technologies Unifies Wealth Offerings Under SS&C Black Diamond Wealth Solutions

2025-08-05

The comprehensive single-source suite combines SS&C's industry-leading wealth & trust management technology and services

WINDSOR, Conn.--(BUSINESS WIRE)-- **SS&C Technologies Holdings**, Inc. (Nasdaq: SSNC) today announced the launch of SS&C Black Diamond® Wealth Solutions. The suite combines SS&C's award-winning Black Diamond Wealth Platform with SS&C's full suite of wealth management solutions to enable wealth managers to easily manage their technology and operations needs in one place.

"We've long relied on multiple SS&C solutions—Black Diamond, Accord, Salentica, and family office services—to serve clients more efficiently and intelligently," said Doug Turner, Principal, Director of Operations & Strategic Projects at Diversified Trust. "Seeing them come together under the SS&C Black Diamond Wealth Solutions brand validates what we've experienced for years: a deep commitment to integration, innovation, and advisor-centric technology."

SS&C Black Diamond Wealth Solutions serves over 800,000 active users across more than 3,000 firms managing more than \$3.6 trillion in assets. Capabilities include:

- Portfolio Management & Reporting – Centralized command center
- Alternative Investments – Tracking, reporting and management
- Client Portal – Secure communications and third-party integration capabilities via web and mobile

- CRMs – Prospecting, relationship management and activity tracking
- Trust & Retirement Services – Trust accounting, reporting and benefits payments
- Compliance & Surveillance – Supports regulatory compliance and monitoring
- Investment Management – Proposal generation, model marketplace and OCIO services
- Trading & Rebalancing – Trade execution with tax-efficient portfolio alignment and straight-through processing
- Business Intelligence & Billing – Practice analytics and revenue management

"The wealth management industry continues to evolve amid the Great Wealth Transfer and changes in investor expectations. To manage these shifts, wealth managers need their technology partners to deliver increasingly connected, modern experiences," said Steve Leivent, Co-General Manager of Wealth and Investment Technologies at SS&C Technologies. "SS&C Black Diamond Wealth Solutions gives firms a truly integrated experience without the friction of working across separate systems. Advisors can now manage the full client lifecycle from one ecosystem, with seamless data flow, automated workflows, and enhanced insights. This unification represents a strategic evolution designed to help wealth managers operate more efficiently, grow faster, and deliver more personalized service at scale."

The introduction of SS&C Black Diamond Wealth Solutions reinforces Black Diamond's ability to serve as the central hub for wealth managers, allowing firms to build an end-to-end technology stack to seamlessly connect proprietary systems and third-party applications.

Current clients will experience no disruption to their existing systems, logins or support relationships. To learn more about SS&C Black Diamond Wealth Solutions and explore the complete offering, visit the new website at **ssblackdiamond.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 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.ssctech.com**.

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Source: SS&C