



NEWS RELEASE

SS&C to Power Wesleyan's New Digital-First Wealth Platform

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One of the U.K.'s leading financial mutual extends 20-year relationship with SS&C

WINDSOR, Conn.--(BUSINESS WIRE)-- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced that Wesleyan Assurance Society ("Wesleyan"), a financial services mutual, has partnered with SS&C to develop its digital-first wealth management platform. The platform builds on Wesleyan's long-term existing relationship with SS&C, which has served as the fund transfer agent for the Wesleyan Unit Trust Managers range of funds for over 20 years.

Following a competitive tender process, Wesleyan selected SS&C Hubwise to deliver the new platform, which will broaden the range of investment and retirement products available to Wesleyan's specialist financial advisers and their customers. The platform will give Wesleyan advisers centralized access to open and manage accounts and investments while offering an enhanced, modernized user experience. SS&C will also provide customer service support under the Wesleyan brand.

Access to the offering will open to a select pilot group of advisers in June 2025.

"Extending our relationship with SS&C with this exciting project is a significant milestone for us," said Katie Wadey, Wesleyan's Chief Product and Commercial Officer. "When fully developed, the new platform will allow us to better meet the savings, investments and wealth needs of doctors, dentists and teachers in an agile way, with the right technology and fund choice."

The platform will support Wesleyan's flagship With Profits Fund as well as a broader range under development.

"We are delighted Wesleyan has chosen to deepen our long-standing collaboration through this transformative project," said Damien Barry, Head of SS&C Global Investor & Distribution Solutions, EMEA. "We look forward to leveraging our deep understanding of the Wesleyan business to deliver a modern, integrated platform."

Since its acquisition in 2022, **SS&C Hubwise** has become **one of the fastest-growing platforms in the U.K.**, onboarding 25 new firms over the past 18 months. The platform now administers more than GBP 20 billion in assets. SS&C's growth comes at a critical time for the wealth management community in the U.K., as shifting regulatory requirements and technological advancements put increasing pressure on advisers to streamline their advice businesses.

Learn more about SS&C Hubwise **here**.

About Wesleyan

Wesleyan is a mutual founded in Birmingham in 1841.

Wesleyan also provides access to its flagship With Profits Fund via the intermediary advice sector.

The Wesleyan Group has £7.6 billion of assets under management as of 31 December 2024.

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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Brian Schell | Chief Financial Officer, SS&C Technologies

Tel: +1-816-642-0915 | E-mail: **InvestorRelations@sscinc.com**

Justine Stone | Investor Relations, SS&C Technologies

Tel: +1-212-367-4705 | E-mail: **InvestorRelations@sscinc.com**

Media Contacts

Sam Gentile

Tel : +1-646-818-9195

Email : **pro-SSC@prosek.com**

Wesleyan Press Office: 077400 24176

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