

Advizr for Financial Planning

Black Diamond® Platform Partner: Advizr Simplifies and Enables Collaborative Financial Planning

A New Era of Wealth Management

Wealth management is in the midst of massive change. From active to passive investing and robo-advisor market disruption to changing client expectations, advisors need to clearly demonstrate their value to provide an elevated service experience.

Platform Partners for a Unified Technology and Service Experience

To help you continue to be successful in a new era, SS&C Advent delivers a comprehensive approach to helping you serve your clients better and more efficiently. Our Platform Partnership program enables streamlined workflows with integrated content and a unified experience with a single, dedicated service team model for ongoing support. Together with our Platform Partners, the Black Diamond wealth platform can help you save time, attract new clients, and enrich the investor experience with engaging dialogue.



Disruptive offerings, like Uber and Netflix, are shifting consumer expectations and proving clients want to have more control of the services they receive. It is important for advisors to build trust with clients by involving them in the financial planning process. Black Diamond Platform Partner, Advizr, makes planning with clients easy and scalable through intuitive functionality and design.

Financial planning is a key component of most client meetings and one of the primary ways that advisors can provide value. It is not a static snapshot for clients but rather an ongoing conversation. Advizr's elegant solution helps advisors engage

Black Diamond with Platform Partners

- Unified technology
- Unified service
- One complete solution

with clients and allows clients to take on more of a self-directed role with individual action items and progress tracking.

Advizr reduces the time it takes to create an initial plan, from hours to just minutes, allowing advisors to expand financial planning services to more clients. Rather than building a financial plan from scratch, the software uses existing client data to develop a baseline plan which can be further optimized based on individual needs and goals.

Platform Expansion

We believe this Platform Partnership helps make you a more competitive and efficient advisor. You will be able to create financial plans in Advizr with existing data from the Black Diamond wealth platform which saves time by eliminating the need to enter data twice. Then, you can access and present those plans within Black Diamond which provides a more synchronized investor experience and saves time during meeting preparation. Our teams' collaboration on building a seamless integration will make it easy for advisors to quickly incorporate financial plans into client meetings and discussions.

With Black Diamond and Advizr, advisors will benefit from:

- Shared data sets that eliminate duplicate data entry
- A single, dedicated service team to provide Level 1 support for both systems

- Increased efficiency through a more synchronized workflow experience
- Convenience of a single invoice for both systems

Coming shortly:

- Financial planning incorporated in the Investor Experience
- The ability to seamlessly combine interactive financial planning with performance reporting in a digital client presentation
- Financial planning content and goals combined into performance reports

A Unified Platform and Experience for Advisors

Automating processes, integrating systems, and building scale are essential for financial advisors to meet client expectations and run a profitable business in the “on-demand” age. Those who rely on manual processes, spreadsheets, and disconnected technology will become less competitive to robo-advisors than those who embrace the efficiencies afforded through new technology.

As companies harness core competencies and build great products that specialize in certain areas, the number of solutions an advisor relies on will continue to grow. We are committed to providing financial advisors with a fully

Say goodbye to bulky and overly complicated financial plans; say hello to an intuitive and collaborative experience.

integrated, unified platform to serve as the central hub for advisors to run their businesses. We currently integrate with dozens of technology partners to power the Black Diamond wealth platform across rebalancing, portfolio analytics, and CRM software providers.

Our partnership with Advizr does not limit your choices regarding financial planning solutions, but provides an opportunity to utilize the best integrated experience available between these two innovative solutions. Because entrepreneurial advisors like you want the flexibility to choose the solutions that work for your business needs, you also can choose from the extensive Black Diamond Integration Network partners.

To learn more about all of our integrations, visit:

<http://blackdiamond.advent.com/integration/>

Availability: Advizr is available to advisors and wealth managers using the Black Diamond wealth platform or Black Diamond Link for Advent Portfolio Exchange®.