

Riskalyze for Risk Alignment

Black Diamond® Platform Partner: Riskalyze Helps You Align with Clients on Risk

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.

Riskalyze: Risk Alignment That Makes Sense to You and Your Clients

Many investors base their actions on gut instincts, conversations with friends, and emotionally-driven decisions. Then, when markets pull back, investors sometimes panic, lock in significant losses, sit out the recovery, and wait to reinvest those assets once the market “feels safe” again.

To counteract this common mistake, Riskalyze invented the Risk Number® which powers its Risk Alignment Platform. The Risk Number is an objective, mathematical approach to



Black Diamond with Platform Partners

- Unified technology
- Unified service
- One complete solution

removing subjectivity by quantifying the risk of investors' portfolios. Financial advisors can use the Risk Number to drive conversations around how much risk investors can handle over the short term to meet long-term objectives.

Platform Expansion

We believe this Platform Partnership helps make you a more competitive and efficient advisor. You can use Riskalyze to accurately determine a client's risk tolerance level (Risk Number), then assess the client's current portfolio risk against his/her Risk Number, which helps guide important conversations. Our teams' collaboration on building a seamless integration will make it easy for advisors to quickly incorporate the risk component into client meetings and discussions.

With Black Diamond and Riskalyze, advisors 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 monthly invoice for both systems

Coming soon:

- Riskalyze reporting and risk questionnaire incorporated into the Investor Experience
- Riskalyze content incorporated into the Black Diamond Advisor Experience and 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. Our goal is to provide financial advisors with a fully 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.

In light of the Department of Labor’s fiduciary rule, advisors must be able to act in the best interest of their clients, and prove it. The Risk Number enables advisors to quantify how much risk an investor wants, has, and needs in order to reach their goals.

Our Platform Partnership with Riskalyze does not limit your choices regarding risk alignment 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: Riskalyze is available to advisors and wealth managers using the Black Diamond wealth platform or Black Diamond Link for Advent Portfolio Exchange®.