

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

Black Diamond with Platform Partners

- Unified technology
- Unified service
- One complete solution

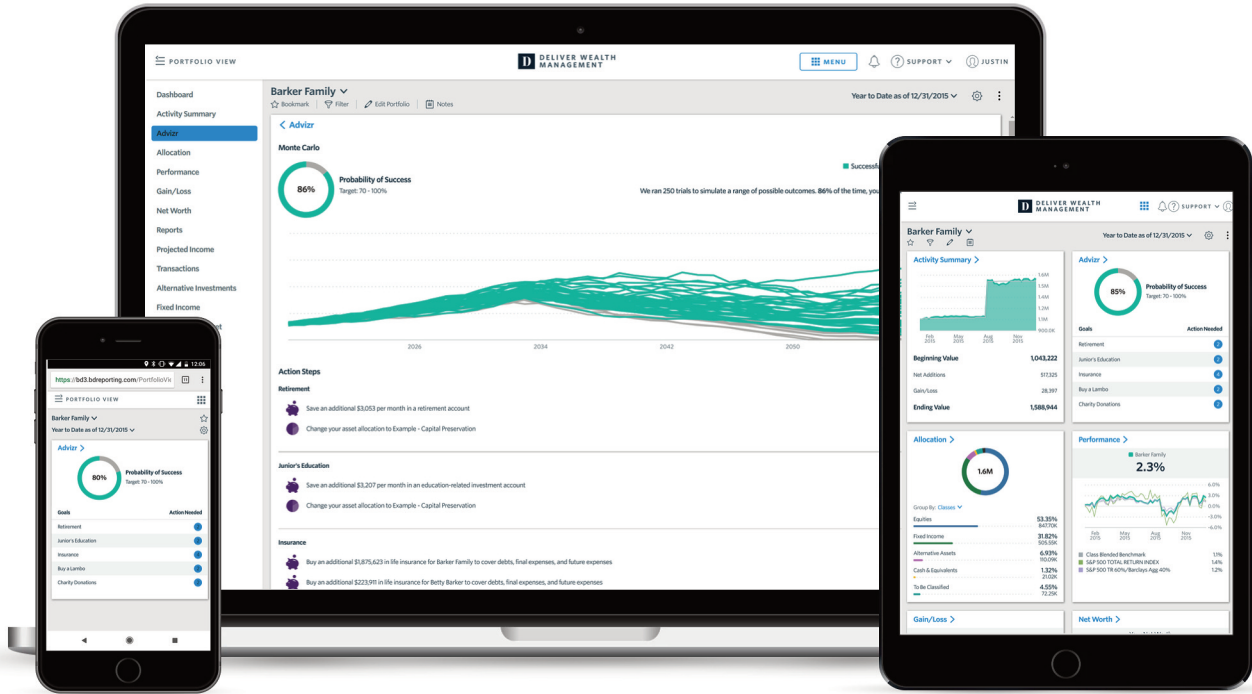
Advizr reduces the time it takes to create an initial plan, from hours to just minutes, allowing advisors to expand financial planning services to more clients. Rather than building a financial plan from scratch, the software uses existing client data to develop a baseline plan which can be further optimized based on individual needs and goals. Plans can be updated in real-time during client meetings to show the impact of multiple "what-if" scenarios.

Platform Expansion

We believe this Platform Partnership helps make you a more competitive and efficient advisor. You are able to create financial plans in Advizr with existing data from the Black Diamond Wealth Platform to save time and eliminate duplicate data entry. Then, you can access and present those plans within Black Diamond to provide a more synchronized investor experience. Our integration makes it easy for advisors to quickly incorporate financial plans into client meetings and discussions.

With Black Diamond and Advizr, advisors benefit from:

- Seamless integration of financial plans in Black Diamond presentations
- An ability to quickly and easily build comprehensive financial plans
- Dynamic plans that stay current with daily data updates from portfolios in Black Diamond



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

- 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

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 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 integrated, unified platform to serve as the central hub for advisors to run their businesses. We currently integrate with more than 40 technology partners and 900+ custodians to power the Black Diamond Wealth Platform.

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.

To learn more about all of our integrations, visit: <http://blackdiamond.advent.com/integration/>

If you're interested in learning more about Advizr, please call 1-800-727-0605 or email us: info@advent.com.