

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 and a complete wealth picture to their clients.

Platform Partners for a unified technology and service experience

The Black Diamond wealth platform enables you to succeed in this new era. Our Platform Partnership program enables streamlined workflows with integrated content and a unified experience with a single, dedicated service team model for ongoing support. By leveraging our built-in, deep integrations, you can 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 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.



Black Diamond with Platform Partners

- Unified technology
- Unified support
- One complete solution

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 makes it easy for advisors to quickly incorporate the risk component into client meetings and discussions.

The partnership between Riskalyze and Black Diamond allows advisors to:

- Consolidate their technology into one centralized, integrated solution
- Enhance client dialogue by incorporating Riskalyze content into reports and presentations
- Monitor risk within client portfolios on a daily basis as part of the overall client dashboard
- Document your assessment of client and portfolio risk to act in accordance with the Department of Labor’s proposed fiduciary rule
- Propose new portfolios to clients based on risk alignment goals
- Streamline service/support by having a single point-of-contact for both platforms

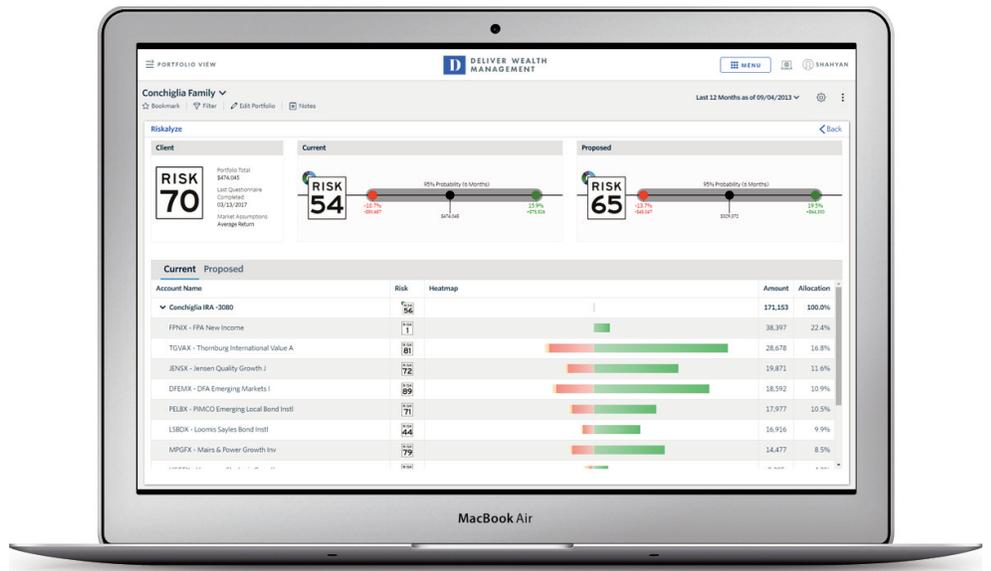
With the native integration, advisors can use Riskalyze's powerful risk alignment tools right inside of Black Diamond so they can seamlessly incorporate risk into their clients' complete wealth picture. Riskalyze content now appears directly in the Black Diamond Wealth Platform including:

- Client, account and portfolio Risk Numbers
- Proposed portfolios based on risk alignment
- Probability charts
- Risk/Reward heatmaps
- Contextual single sign-on (SSO) to Riskalyze

A unified platform and experience for advisors

Our integration with Riskalyze is just part of the bigger picture for Black Diamond as SS&C Advent continues to invest in delivering advisors a complete wealth platform with financial planning, risk assessment, outside aggregation, CRM, and access to managed accounts.

Availability: Riskalyze is available to advisors and wealth managers using the Black Diamond wealth platform or Black Diamond Link for Advent Portfolio Exchange®. Firms can purchase Riskalyze directly from SS&C Advent. Contact your Black Diamond representative to schedule a personalized demo.



To learn more about our integration with Riskalyze, please visit: <http://blackdiamond.advent.com/riskalyze>