



THOUGHT LEADERSHIP FROM A TECHNOLOGY LEADER

Checklist—For an Advanced Advisory Platform

Simplify your life,
elevate your business
and strengthen your
client relationships.

Here's a checklist of what you should look for in a core technology platform:

- Portfolio management, reporting and rebalancing capabilities in a single platform with one login
- Client portal, document vault and communications tools, customizable to the specific needs of your clients
- High-quality, daily aggregated data reconciled to the asset level
- Alternative investments tracking and fixed-income support
- Flexible, easy-to-use client billing
- Extensive integrations with flexibility for a la carte or bundled solutions for CRM, financial planning, proposal generation and analytics
- Backing of a high-touch service team

Let us help you find the right technology solution to delight your clients

Contact SS&C Advent to find out how the cloud-based, integrated Black Diamond® Wealth Platform can help you strengthen relationships, attract new clients and grow your business.

Talk to a specialist today: (800) 727-0605

Learn more at blackdiamond.advent.com