



THOUGHT LEADERSHIP FROM A TECHNOLOGY LEADER

## 7 Critical Features—The Ideal Interactive Client Experience

There are client portals, and then there's a truly engaging, interactive client experience.

The difference between an off-the-shelf client portal and a customizable client experience is a robust set of value-adding features that include:

1. **Elegant Interface**—User friendly graphic displays for easy, intimate viewing
2. **Mobile Friendly**—Access to accounts where the portfolio view automatically adapts to a client's mobile devices or desktop mobile devices anywhere
3. **Account Aggregation**—View of all holdings, including those managed across multiple platforms
4. **Reporting**—Real-time updates to holdings and generation of personalized reports
5. **"Drag and Drop" Customization**—Ability to configure screen and content layout
6. **Document Vault**—Secure area to upload and download important documents
7. **Notifications**—Proactively communicate directly with clients about events that affect their portfolios, such as news about specific securities

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.

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