



THOUGHT LEADERSHIP FROM A TECHNOLOGY LEADER

## 4 Ways—Connecting With the Next Generation of Investors

A new generation of high-earning, wealth-building investors is emerging. They're independent thinking. Skeptical. Tech savvy. At home online. Highly mobile. And poised to control over \$28 trillion in assets by 2020.

How can you connect with them? Pitchbooks, quarterly reports, annual reviews and static email are not going to cut it. They expect 24 x 7, on-demand access to their wealth picture. Here are four ways your firm can show it understands today's technology and today's investors.

1. **Make information available on multiple devices**—Your firm's technology must be capable of delivering your clients' financial data anytime, anywhere, to any device.
2. **Provide a complete picture of your client's assets**—You should be able to report on all your clients' assets, managed outside your firm. Let clients know you see the bigger picture, and you're focused on their success.
3. **Tell your story better. Close more deals**—Tell your story using elegant, graphical and configurable dashboards and dynamic reports. Demonstrate how your firm has helped others accomplish similar goals.
4. **Be the center of your client's investing universe**—Use your clients' preferred channels of communication to remind them of the value you provide. Be top of mind when they're making financial decisions.

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](https://blackdiamond.advent.com)