SS&C Deliver 2025

Wealth Management Track Session Guide

SS&C DELIVER 25 PHOENIX

SS&C Deliver Phoenix

We are excited to host a superb lineup of curated sessions for our wealth management clients. Join us for conversations on industry and market trends and ample networking opportunities with industry colleagues and leaders from across our solutions.

Please reference this session guide as you build your personal event schedule. You may also access a complete session agenda and event details on the SS&C Deliver site.

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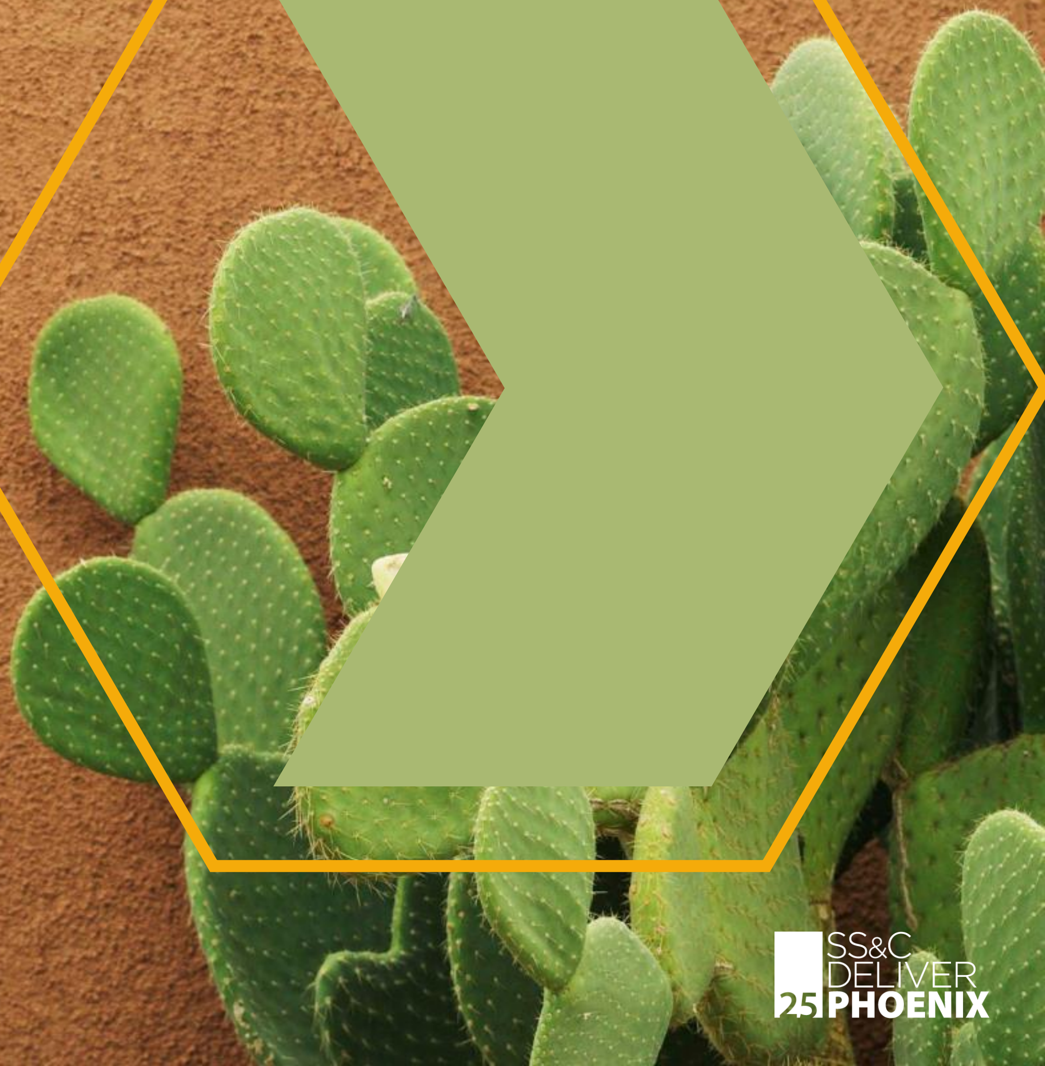

SS&C DELIVER 25 PHOENIX

Sunday, October 26

Join us in Phoenix on Sunday to kick off Deliver.

Enjoy an evening of networking, great food, and meaningful conversations as we set the stage for an engaging event.

Welcome Reception and Dinner | 5:30 pm – 8:00 pm

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Monday, October 27

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Breakfast in the Exhibit Hall | 8:00 am – 9:00 am

Welcome and Keynote Session | 9:00 am – 10:15 am

The Future of WealthTech | Black Diamond's Product Roadmap | 10:30 am – 11:15 am

Join us for an exclusive, forward-looking session that explores what's on the horizon for SS&C Black Diamond® Wealth Solutions. Discover how our newly unified brand and comprehensive, all-in-one platform are evolving to serve the needs of both wealth management firms and trust companies. Attendees will gain insight into upcoming features and strategic developments designed to empower advisors, streamline operations, and elevate the client experience. This session offers a unique opportunity to see where the platform is headed and how our forward-looking roadmap helps your firm stay ahead in an increasingly complex and competitive landscape.

Modern Trust Management | Purpose-Built Tools for Fiduciaries and Wealth Managers | 11:30 am – 12:15 pm

In this product-focused session, discover how Black Diamond Trust Services leverages digital innovation to modernize trust administration, streamline document management, and enhance collaboration between fiduciaries and their clients. Designed for wealth managers and trust professionals, this session will highlight how integrated, purpose-built tools reduce operational complexity, improve transparency, and elevate the client experience.

Monday, October 27

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Lunch in General Session Room | 12:15 pm – 1:30 pm

Building a High-Performing Advisory Team | Leadership & Talent Development | 1:30 pm – 2:15 pm

Talent is a defining factor in the success of any wealth management firm. This thought-leadership panel brings together industry leaders to share how they're rethinking recruitment, investing in employee development, and building cultures that inspire long-term commitment. From innovative hiring practices to strategies for nurturing future leaders, attendees will gain practical insights into building and sustaining a strong, future-ready team. Join us to learn how top firms are evolving their talent strategies to meet the demands of our industry.

Storytelling & Communication | Elevating Client Conversations | 2:30 pm – 3:15 pm

Technical expertise alone isn't enough in an industry driven by trust and long-term relationships. This session explores how wealth managers and trust companies can harness the power of storytelling and behavioral science to deepen client engagement and drive better financial outcomes. By learning how top advisors use narrative techniques to make complex strategies more relatable and apply insights to help clients overcome biases, stay committed to their goals, and make more informed decisions, you can potentially increase your client retention and revenue. Discover how blending data with empathy can transform client conversations and your practice.

Break in Exhibit Hall | 3:15 pm – 3:45 pm

Monday, October 27

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Exploring Innovation and Automation | How Wealth Managers Are Adopting Emerging Technologies | 3:45 pm – 4:30 pm

Innovative and emerging technologies are no longer abstract concepts—they're reshaping how we live and work. Within wealth management, these tools have the potential to enhance portfolio management, streamline operations, and elevate client engagement. In this thought-leadership panel, you'll hear directly from wealth managers experimenting with and implementing new technologies within their firms. Panelists will share their strategies, successes, and lessons learned. Whether you're just beginning to explore new solutions or looking to refine your approach, this session offers a peer-led perspective on how technology is transforming the advisor experience.

Networking Reception in the Exhibit Hall | 6:00 pm – 7:00 pm

Opening Night Dinner Event | 7:00 pm – 9:00 pm

Tuesday, October 28

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Breakfast in the Exhibit Hall | 8:00 am – 9:00 am

General Session | 9:00 am – 9:45 am

From Models to Results | Real-World Applications & Best Practices | 10:00 am – 10:45 am

This session showcases how advisors leverage the Black Diamond Model Marketplace to deliver customized, tax-aware portfolios by integrating separately managed accounts (SMAs) with traditional investment products. Through a live demonstration and case studies, attendees will learn how integrated workflows connect advisors with leading model and SMA providers, streamlining implementation and enhancing client outcomes. A moderated discussion will follow, featuring clients and asset managers who will share lessons learned, practical tips, and how collaboration on the platform benefits all parties, including the end investor.

Navigating Family Dynamics in Wealth Transfer & Trust Planning | 11:00 am – 11:45 am

When wealth transfers, the occurrence is more than a financial event. Instead, it is a deeply personal moment that can strengthen or strain family relationships. In this session, we'll explore best practices for advisors to lead with empathy, build trust across generations, and facilitate meaningful conversations around legacy, roles, and responsibilities. You'll learn to navigate complex family dynamics, address sensitive topics confidently, and position yourself as a strategic partner in multi-generational trust planning.

Lunch in General Session Room | 11:45 am – 1:00 pm

Tuesday, October 28

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The Evolving Landscape of Alternative Investments | 1:00 pm – 1:30 pm

Alternative investments are increasingly important in portfolio construction, offering potential diversification and risk mitigation beyond traditional asset classes. This session will examine how your tech stack, using SS&C Black Diamond Wealth Solutions and SS&C Accord, can be a catalyst, not a constraint, for incorporating private investments into client portfolios. We'll showcase how Black Diamond technology allows firms to automate tracking and reporting, ensure data integrity, and elevate the advisor-client experience.

Personalization at Scale | Leveraging Client Portals & Digital Onboarding Tools | 1:45 pm – 2:15 pm

As client expectations grow more sophisticated, delivering personalized investment strategies through seamless digital experiences becomes a key differentiator. By leveraging digital capabilities, firms can unlock new growth opportunities and elevate the client experience. This session explores how integrated tools and data connections empower wealth managers and fiduciaries to tailor proposals, streamline onboarding, and enhance ongoing engagement. Attendees will learn how to maximize the value of their technology through Black Diamond solutions to achieve greater efficiency, deeper customization, and scalable impact.

Winning with Mergers & Acquisitions | Growth Strategies for RIAs | 2:30 pm – 3:00 pm

Join us for an engaging and informative session that dives into today's mergers and acquisitions (M&A) environment. Industry consultant Lisa Crafford will sit down with a key client to share and discuss firsthand insights on the current M&A landscape, including emerging trends, key challenges, and growth opportunities. Attendees will gain actionable guidance on best practices for deal structuring and strategies for successful post-acquisition integration. These practical tools and guidance will empower you to take the next steps confidently, whether you're considering your first acquisition or expanding a growing portfolio.

Tuesday, October 28

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Break in Exhibit Hall | 3:00 pm – 3:30 pm

Closing Session | 3:45 pm – 4:30 pm

Closing Night Signature Event | 6:30 pm – 9:30 pm

Wednesday, October 29

Golf Tournament (Optional)| 8:30 am

Product Labs

While at Deliver, be sure to carve out time to connect one-on-one with the Black Diamond team in the Product Lab. Our experts will be on hand to provide hands-on support, answer your firm's in-depth questions, and help you discover new ways to unlock the full potential of your technology.

Lab Location | Grand Sonoran G

Monday, October 27 | 10:30 am – 4:30 pm

Tuesday, October 28 | 10:00 am – 3:30 pm

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