SS&C Black Diamond WEALTH PLATFORM

Wealthscape℠

Powerful Integrations. Compelling Results.

Black Diamond and Wealthscape℠ users enjoy intuitive workflows and the ease of moving between platforms.

Today, financial management firms of all sizes and types leverage the award-winning Black Diamond® Wealth Platform to streamline operations, deliver business insights, and connect with both prospects and clients to build long-lasting relationships.

Black Diamond offers a fully-integrated cloud-native solution complete with performance reporting, portfolio rebalancing, an immersive client portal, and seamless connections to a vast ecosystem of smart integrations. Proactive, personalized attention from a dedicated service team ensures advisors receive access to an elite combination of technology and service.

For mutual clients of both Black Diamond and Wealthscape, simplification is key to providing an elevated user experience. With integrations like *Straight Through Trade Processing with FIX®* and *Statements and Tax Documents*, our clients enjoy an intuitive workflow along with the ability to seamlessly navigate between platforms.

Existing integrations between Black Diamond and Wealthscape provide advisors with:

- Bi-directional single sign-on
- Straight through trade processing via FIX
- Cost basis sync
- Custodian alerts
- Statements and tax documents
- Client profile
- Service center
- Digital account opening
- Positions
- Balances
- Cashiering

Within Black Diamond, advisors leverage cutting-edge solutions that drive success, such as:

- Comprehensive portfolio management
- Customizable reporting
- Immersive *Client Experience*
- Next-generation *Rebalancer*
- Intuitive dashboards
- Robust *Billing*
- And much more

> The Wealthscape and Black Diamond integration allows me to have a meaningful and efficient performance conversation with my clients.
>
> — Jennifer Wood, Director of Client Experience, Halpern Financial Inc.

At the Heart of Your Business: One platform to support your unique needs.

FOR MORE INFORMATION

If you have questions about any of the Wealthscape integrations, or would like to learn how the Black Diamond Wealth Platform can support your business, call Tony Emma at 1-630-346-8096 or temma@sscinc.com. You can also visit blackdiamond.advent.com

> To best serve the end investor, advisors need easy access to real-time account data and key financial documents from their custodian, as well as the ability to quickly execute trades. This is why we continue to work closely with the team at Wealthscape to develop tight integrations that provide intuitive workflows and seamless access between our solutions.
>
> — Brian Justice, Vice President, Advisory Sales, SS&C Advent

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