

CASE STUDY

Lindberg & Ripple

Scaling Alternative Investment Reporting with SS&C Accord

The Challenge

Founded in 1984, Lindberg & Ripple provides sophisticated investment and insurance solutions to wealthy families, successful executives, and business owners. As client portfolios grew increasingly complex—particularly in the private markets—the firm needed a more scalable and efficient way to manage and report on alternative investments.

Advisors were spending significant time manually collecting statements, reviewing activity, and entering data across systems. These fragmented processes were not only time-consuming but also limited the firm's ability to deliver comprehensive, timely insights to clients.

The Solution

To address these challenges without compromising its high-touch approach, Lindberg & Ripple turned to SS&C Black Diamond® Wealth Solutions, with the integrated SS&C Accord service.

Together, the platforms provided a fully managed, end-to-end solution for automating the collection, validation, and processing of alternative investment data.

Accord's digital infrastructure seamlessly syncs data into Black Diamond, enabling real-time visibility into client portfolios across traditional and non-traditional assets.

Results & Benefits

With the implementation of SS&C Accord integrated into the Black Diamond platform, Lindberg & Ripple has significantly improved their management of alternative investment reporting. The firm now automates the retrieval, validation, and processing of complex private investment data, removing the need for manual entry and oversight. This automation not only reduces operational burden but also increases the accuracy and timeliness of portfolio reporting.

Advisors now benefit from a unified, real-time view of client wealth that includes both traditional and non-traditional assets. This comprehensive perspective enhances client conversations and strengthens Lindberg & Ripple's ability to deliver strategic advice.

Since adopting the solution, the firm has scaled its private investment services significantly—experiencing a 400% increase in alternative investment account volume.

Profile

Client: Lindberg & Ripple

Location: Palm Beach Gardens, Florida

Description: Independent wealth advisory firm focused on high-net-worth individuals and families

AUM: \$1b+

Implementation Year: 2023

Background

- Founded in 1984, Lindberg & Ripple is an independent wealth management and insurance advisory firm
- Serves high-net-worth individuals, families, executives, and business owners
- Offers integrated investment and insurance solutions with a high-touch, team-based approach
- Combines over 40 years of expertise with a strong culture of collaboration and client-first service

More than \$420 million in private market assets are now automatically retrieved and surfaced in Black Diamond, eliminating the need for fragmented workflows.

Importantly, this powerful integration came without additional complexity. Because Accord is included under Lindberg & Ripple's existing Black Diamond agreement, the firm gains full-service support without the need for a separate contract, enabling growth with minimal lift from internal teams.

Why Black Diamond

By integrating SS&C Accord with the Black Diamond platform, Lindberg & Ripple unlocked a scalable, full-service solution that improves transparency, simplifies operations, and empowers advisors to deliver more value to clients. The result is a streamlined, data-driven approach that supports growth and enhances the client experience—without adding back-office burden.

“Before using Accord, we struggled with gathering complete data, inputting it efficiently, and tracking account activity. Now, we rely on the Accord team to handle those functions, allowing us to focus on client service.”

— **Hayley A. Snell**
Chief Compliance Officer, Lindberg & Ripple

Benefits

- + Scaled alternative investment reporting with a 400% increase in account volume
- + Eliminated fragmented workflows by automating the retrieval, validation, and processing of over \$420M in private market assets
- + Reduced operational burden and increased data accuracy through seamless integration of SS&C Accord and Black Diamond
- + Enabled real-time visibility into both traditional and alternative assets, providing advisors with a unified view of client portfolios
- + Strengthened client relationships by delivering more timely, comprehensive reporting and strategic advice
- + Achieved growth with minimal internal lift, thanks to full-service support included under their existing Black Diamond agreement

To learn more about Lindberg & Ripple, please visit their website at lindbergripple.com.

Learn how Black Diamond Wealth Solutions can support your business.

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