

## Upgrade Services

# Stay Up to Date to Make the Most of Your Technology

In today's financial climate, it's more important than ever for investment managers to keep up with change. Firms need to comply with ever-changing regulatory requirements as well as client mandates. Furthermore, it's essential to have the right tools in order to work efficiently and ultimately make better investment decisions. Are your systems current enough to give you that advantage?

### The Benefits of Upgrading

SS&C Advent quickly responds to industry requirements and market trends, and updates our products regularly. This allows you to take advantage of new functionality faster, increase efficiency and make your solution more scalable. Initially you might not want to upgrade for every release, but the improvements of each release will make it easier for you to upgrade when the time is right for you. The more current your systems are, the easier the upgrade will be.

### Upgrade Services for a Successful Transition

SS&C Advent offers dedicated services delivered by upgrade specialists to ensure you start using the latest version as quickly and painlessly as possible. All of our consultants have broad experience working with our solutions, and our team has helped hundreds of firms upgrade. With SS&C Advent's Upgrade Services you will benefit from dedicated professionals who will oversee all elements of your upgrade project, from planning the upgrade to managing the implementation and offering training on the new features. Upgrades are tailored to your firm and can be delivered remotely or onsite, based on your preference.

### The Upgrade Project

Our team will work closely with you to make sure all requirements are met, and take you through all the necessary steps in a streamlined, end-to-end process.

**Plan:** Complete upgrade questionnaire, review current setup, validate custom items.

**Prepare:** Discuss system optimization, define scope and set agenda, agree on timeline and estimate.

**Upgrade:** Setup and configure, administer data, test and deploy.

**Finalize:** Confirm deliverables, provide documentation, give training.

### Tailored Services to Meet Your Needs

Our global presence and local expertise enable us to tailor services to your exact needs. By combining our knowledge and experience with industry best practices, you can count on us for the support and guidance you need to make the most of your SS&C Advent technology and continue to develop your business.

Email us at [advent@sscinc.com](mailto:advent@sscinc.com) for more information or to schedule an upgrade.

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“Updating ensures the systems will remain fully supported to mitigate any risk. It also allows us to take advantage of a lot of additional functionality that has been introduced and that we were missing out on.”

— Jonathan Campbell, IT Project Manager, London & Capital Asset Management