SS&C | RENDEZVOUS

SS&C Rendezvous and the SS&C Black Diamond® Wealth Platform

Providing wealth management advisors with a turn-key solution that delivers modern, time-saving tools focused on the client experience and investment goals.

HUMANIZE INVESTING | DEMYSTIFY MODEL ALLOCATIONS | SIMPLIFY WORKFLOWS | RECAPTURE TIME

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Six Layers of Influence that Drive Successful Investment Outcomes

Today's wealth management advisors are expected to wear numerous hats and handle varying layers of responsibilities to meet their client's investment goals. The "RIA Active Investment Stack" outlines the six layers of influence that lead to successful outcomes for an advisor's client:

RIA Active Investment Stack

6 - Security Selection — Manager-level active alpha generated through investment insight.

5 - Implementation Cost — The all-in cost of accessing specific investment modalities (management fees, transaction fees, liquidity costs, etc.).

4 - Exposure Allocation — How specific return/risk modalities are defined and in which investments are placed.

3 - Asset Allocation — High-level risk/return allocations to asset classes and capital structure to build portfolios that take risk efficiently to reach return objectives.

2 - Financial Planning — Client-specific, goals-based decision making to set long-term intentions.

1 - Financial Relationship — The initiation, commitment, and maintenance of a consistent, collaborative process with a client to make investment decisions.

Most RIAs' time and expertise are spent in two segments – **Financial Planning** and **Financial Relationship**. These segments require the most customization, time, and behavioral intelligence information.

The Black Diamond Wealth Platform ties together the "RIA Active Investment Stack" in a comprehensive, intuitive, elegant, and reliable solution.

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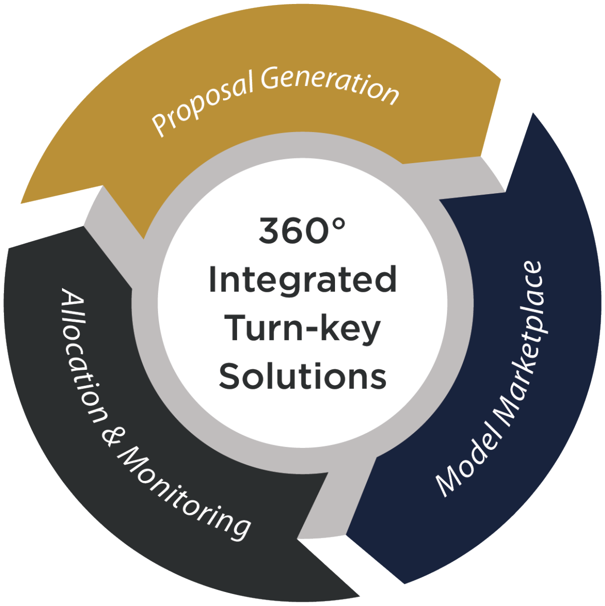
How can Rendezvous and the Black Diamond Wealth Platform Elevate Your Service?

Through seamless integration with Black Diamond, Rendezvous streamlines proposal generation and model assignment so that you can focus on your relationships.

- Investment and operational technologies
- Access to AI-driven client risk questionnaires
- Goals-based model recommendations
- Reduced back-office workloads
- Automated allocation and rebalancing workflows

With Rendezvous' 360° integrated turn-key solutions, RIAs can:

- *Gain the upper hand in today's competitive landscape.*
- *Realize a reduction of "time in app" and an increase in "time with client".*



Experience Clarity and Recapture Time in a Single Work Environment

HUMANIZE INVESTING

Automated and intuitive AI-driven client risk questionnaire streamlines investment proposal generation.

- Execute prospecting and dynamic financial planning within Black Diamond's modern and fully digital *Client Experience* portal
- Create a client personality profile and leverage their reverse-constructed persona in assessing risk tolerance
- Integrate existing client balances and goals to recommend a client-specific, goals-based trajectory of investment allocations
- Enable a client-driven proposal generation process with investment allocation pre-approval that is easily shareable via Black Diamond's *Client Experience* portal
- Leverage scenario analysis to help clients understand their portfolios in the context of the world around them
- Incorporate tax-aware transitions for a more holistic and comprehensive model adoption process

DEMYSTIFY MODEL ALLOCATIONS

Integration of the Model Marketplace empowers advisors to showcase Rendezvous and advisor-generated model recommendations.

- Unlock Rendezvous' model options across the objective and risk spectrum to fit client outcomes
- Integrate advisor-designed models to supplement Rendezvous' model marketplace
- Access model documentation and supporting analytics
- Utilize client-oriented educational multimedia (including, but not limited to, podcasts, webinars, and literature) to enhance the client experience

SIMPLIFY WORKFLOWS

Leverage the full functionality, rebalancing capabilities, and automated workflows of the Black Diamond *Rebalancer* to monitor the portfolio and support the advisor.

- Regain time currently spent manually adjusting client investment allocations
- Integrate and automate rebalancing and dynamic planning workflows
- Customize alerts and rebalancing constraints based on client preferences
- Streamline continuous financial planning with automated proposal status checks and session queuing

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FOR MORE INFORMATION

For more information on how SS&C solutions such as Rendezvous and the Black Diamond Wealth Platform can support your unique advisory business, request a consultation today.

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