SS&C Trust Suite

Exceed Client Expectations with Trust and Technology

Clients expect more from their trust and wealth providers than ever before.

Your clients want a hands-on approach to their financial future. They demand tools that give them real-time access to account information, performance and financial advice. This requires an incredible amount of work for wealth managers to gather all this information and present it in a way that is pleasing and easy to understand.

The SS&C Trust Suite seamlessly integrates your firm's front-office tools powered by your back-office data. Designed to be configured to the unique needs of your business, firms can leverage cutting-edge solutions to help provide the information their clients want, to clearly see that future.

SS&C Trust Suite Solutions At-A-Glance

For more information, visit
ssctech.com

Meeting the Demands of Your Business

Our experience and expertise in providing technology solutions allows us to deliver a competitive client experience while increasing operational efficiency. Key features of the SS&C Trust Suite include:

- Innovative digital experience with a fully customizable and mobile-friendly portal for users and clients
- Modern reporting customizable to your needs, branding, and data display preferences
- Automatic daily flow of accounts, transactions, and positions data
- Daily auditing of aggregated accounts, using automated reconciliation engine tools to monitor and resolve issues directly with custodians
- Fully integrated, next-gen Rebalancer provides proactive monitoring and enhanced modeling
- Straight through order processing and automated security setup eases operational burdens
- Open API for best-of-breed integrations connected to an extensive network of preferred providers
- Reg-9 and Admin Review functionality supports exception tracking, configurable questions and answers, and follow-up tracking
- System generated 1099s, 5498s and tax worksheets increases efficiency

Empowering Your Success

Designed to be configured to the unique need of your business, the SS&C Trust Suite provides your firm with:

- Access to a complete view of account information, tailored to your unique needs, via an immersive client-experience portal
- Reduced costs by providing you a single vendor vs multiple vendors
- Flexible managed services offering, so you can choose the right level of business process outsourcing to meet your business needs
- Management of all integrations, and integration data, by removing the need for data entry in multiple systems
- Business growth by providing a dynamic, user-friendly front end that provides client's with 24/7 access to their information

About the SS&C Trust Suite

By pairing the industry's premier talent with our exemplary technology, SS&C is able to deliver a uniquely comprehensive offering that contemplates our clients' long term growth. The SS&C Trust Suite merges the power of industry leading trust offerings from SS&C Innovest, the Black Diamond® Wealth Platform, SS&C Salentica, and more.

For more information, contact us at (800) 727-0605 or info@sscinc.com.

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