

Reimagining Wealth Management Reporting



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The SS&C Black Diamond Wealth Platform helps wealth management firms streamline operations, strengthen client connections, and support long-term growth. By centralizing key functions—from portfolio management to client engagement—Black Diamond simplifies workflows with flexible integrations and dedicated support from a trusted provider.

What enabled you to reach this award-winning level?

It starts with listening. At SS&C, client feedback isn't just collected—it's treated as a roadmap. The consolidated reporting capabilities of Black Diamond were developed alongside advisors who sought clarity, flexibility, and control.

This input shaped a reporting engine that simplifies complexity across households, trusts, entities, and generations. What sets us apart is delivering complex insights in a clear, digestible format for both advisors and clients. Our relentless focus on user experience and operational efficiency helped earn this recognition.

How did your colleagues make a difference?

The award reflects collaboration across product management, engineering, and client support. Product teams bring empathy by understanding real advisor workflows and designing features accordingly. Engineering delivers with precision despite tight deadlines. Client success teams ensure smooth adoption through tailored training and support.

Everyone shares one goal: create a platform that works for users—not just internal requirements.

How will you maintain high standards?

Innovation doesn't end at launch. We continuously iterate based on advisor feedback collected via user groups, platform analytics, and one-on-one conversations. Our Great Ideas portal empowers users to submit daily suggestions that actively shape our product roadmap. We strive to anticipate client needs and help advisors offer proactive guidance, reflecting our commitment to continuous improvement.

What challenges did you face and lessons learned?

Balancing customization with simplicity was a key challenge. Advisors serve clients with diverse expectations and financial literacy. We learned configuration must never compromise clarity and have adapted accordingly.

Internally, close alignment across product, engineering, marketing, and support proved essential. This collaboration ensures cohesive feature delivery and reinforces the value of shared vision.

Where do you seek ideas and inspiration?

Our best ideas come from the advisors we serve. They navigate increasingly complex households, trusts, and philanthropic structures. Their experiences shape our solutions.

Outside the industry, we look to leading consumer apps known for blending powerful tools with intuitive design. If everyday apps can deliver fast, intuitive financial experiences, high-net-worth clients deserve the same simplicity with sophistication.

What impact does winning this award have?

This award affirms the value of what we've built and how we built it. Internally, it reinforces that every detail matters—from font hierarchy to entity-level rollups.

Externally, it shows Black Diamond's commitment to addressing real advisor challenges with elegant, effective solutions. The recognition deepens trust with current clients and sparks conversations with forward-thinking firms. Ultimately, it supports clients by reaffirming our dedication to practical innovation and constant improvement.

Where is wealth management headed in the next five years?

The sector is moving toward deeper personalization, tighter tech stacks, and rising client expectations. Advisors will need tools that don't just report past results but tell a story: What changed? What needs attention? What's next?

Consolidated reporting will evolve from assembling numbers to delivering actionable insights. Black Diamond will help advisors transition from data stewards to strategic guides on their clients' financial journeys.