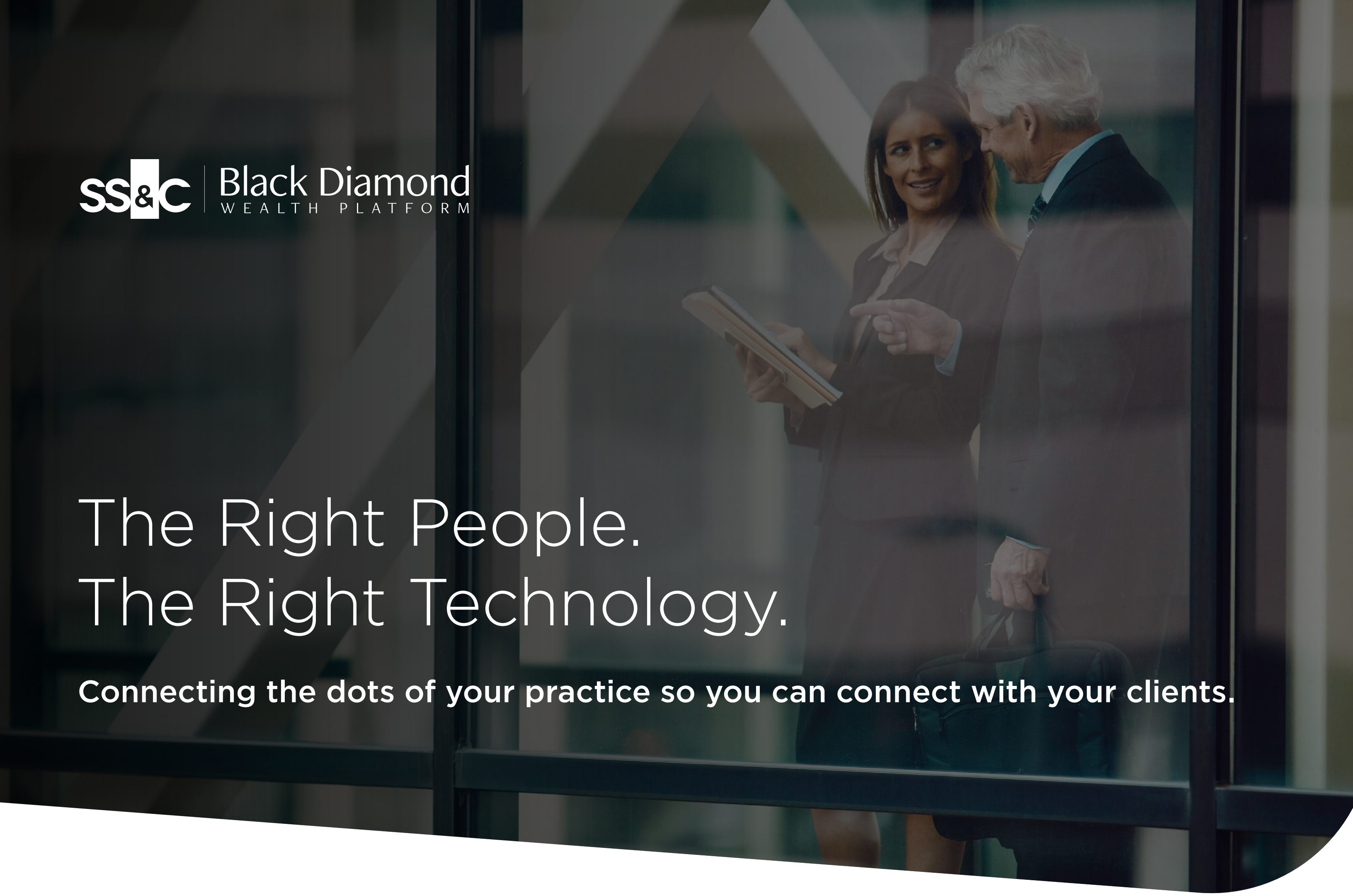


SS&C | Black Diamond WEALTH PLATFORM

The Right People.
The Right Technology.

Connecting the dots of your practice so you can connect with your clients.

blackdiamond.advent.com | info@advent.com

You don’t need another product. You need a partner.

As an extension of your team, the Black Diamond® Wealth Platform provides you with tools to operate efficiently and deliver a sophisticated, modern client experience.

The Black Diamond difference means you gain:

— Forward-thinking technology that is continuously updated

— An elevated client experience through a firm-branded, mobile-friendly portal

— A single point of contact who provides dedicated, highly personalized support

— Prompt, reliable data aggregation that is automatically reconciled each day

— Access to a vast integration network of complementary solutions

At the Heart of Your Business: One platform to support your unique needs.

A Comprehensive Solution, Designed with You in Mind

Cloud-based. Client-focused. Complete.

FRONT OFFICE

Client Experience & Communications

Through a custom-branded, interactive client portal, you can document advisor-client communications, showcase dynamic portfolio metrics, post to a secure document vault, incorporate outside account aggregation, balance sheet reporting, and more.

Portfolio Management & Reporting

Oversee portfolios in the context of the entirety of the client relationship through a centralized command center. Insights are viewable at-a-glance through dynamic and configurable portfolio metric cards which can be expanded for in-depth analysis. The use of drag-and-drop functionality and pre-built templates make it easy to generate beautifully crafted reports that can be shared to your client's portal.

Data Aggregation & Accounting

Data is aggregated from hundreds of sources and reconciled to the asset level daily. Supplemental details are added such as prices, indexes, and ratings for quick analysis.

BACK OFFICE

Rebalancing & Trading

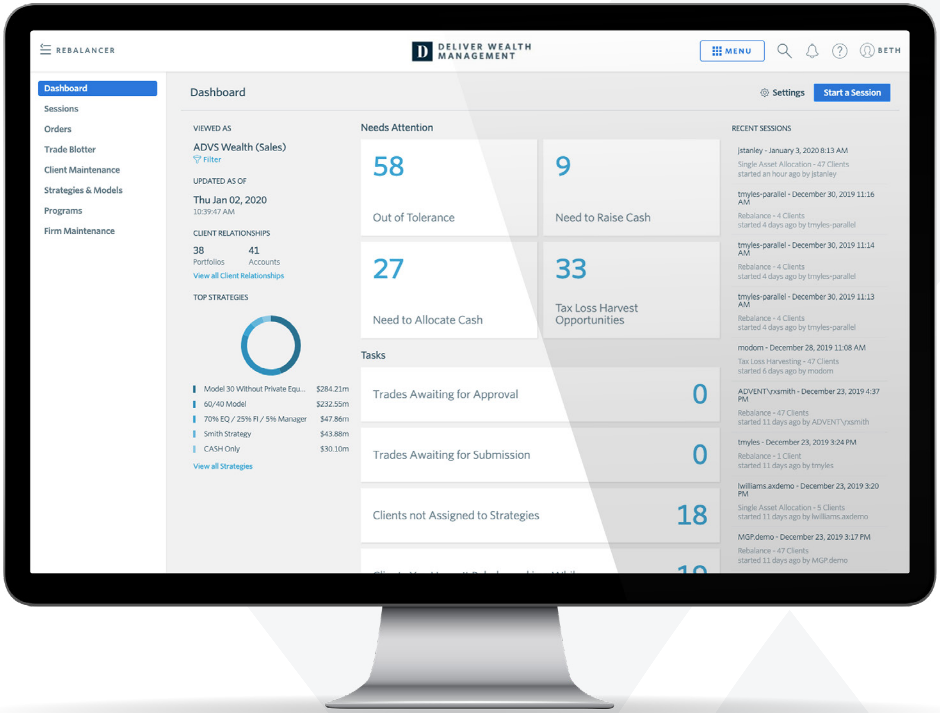
Monitor, rebalance, and execute trades at scale. The robust modeling framework, proactive monitoring, straight-through trade processing, and tax-efficient capabilities keep even the most complex portfolios aligned with your client's goals.

Business Intelligence & Compliance

Take the pulse of your business, identify trends and outliers, and examine the finer details of advisor performance and your client relationships. Granular permission controls, compliance-ready formats, report automation, and more make oversight manageable while providing a 360-degree view into your practice.

Billing & Revenue Management

Itemize your value by structuring fees in a way that makes sense to both you and your clients. The countless configuration settings and built-in workflows allow a streamlined process, eliminating the need to run billing more than once per period.



UNLIMITED & DEDICATED SUPPORT

Leverage a complete service team that feels like an extension of your back office. Led by your dedicated Client Advocate, your team is available to assist with such things as data research, custodial data intake, data reconciliation, and issue resolution. Ongoing user training is available to ensure you maximize the platform's ROI.

Create an Unparalleled Technology Ecosystem

An extensive integration network connects you to your choice solutions for financial planning, CRM, risk analysis, managed accounts, data services, and more. Bi-directional data feeds, single-sign-on, and incorporated content streamlines workflows and boosts productivity.

Featured platform partnerships do not limit your choices, but deliver an experience that exceeds expectations.

FEATURED PARTNERS & INTEGRATIONS

riskalyze

Portfolio Analytics

Pinpoint your client's risk tolerance and then build their portfolio to meet those expectations and quantify suitability.

SS&C | Salentica

CRM

Easily manage all of your client relationship information including client profiles, activities, and communications.

SMArtX

Managed Accounts

Leverage a single interface to manage traditional and alternative investment strategies through a UMA/SMA structure.

RIGHTCAPITAL

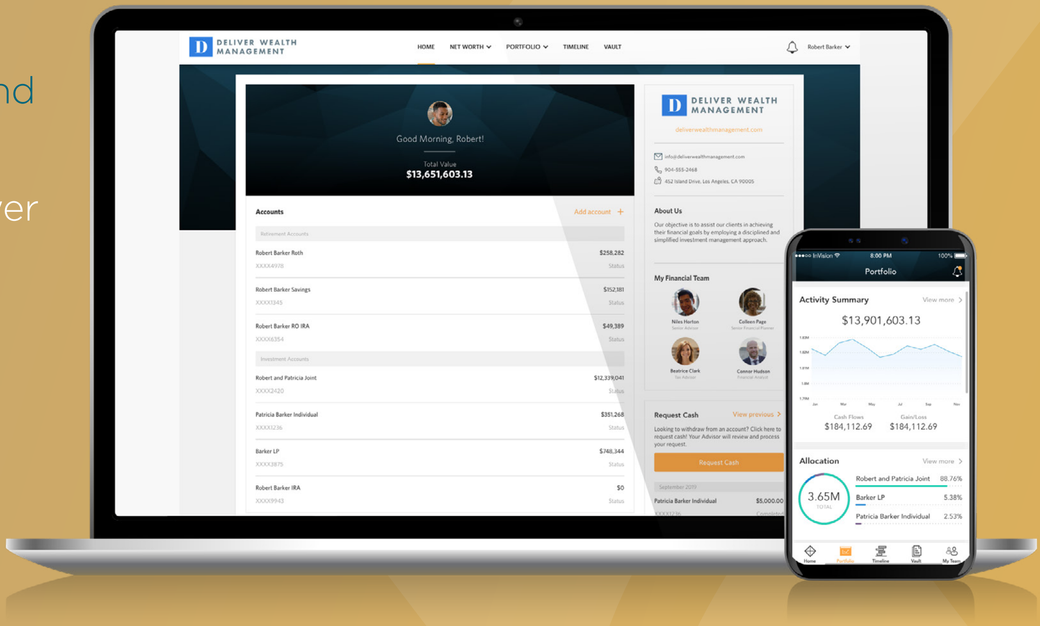
Financial Planning

Easy-to-use, plug and play functionality for financial planning allows advisors to focus on client interactions.

Moving the Industry Forward

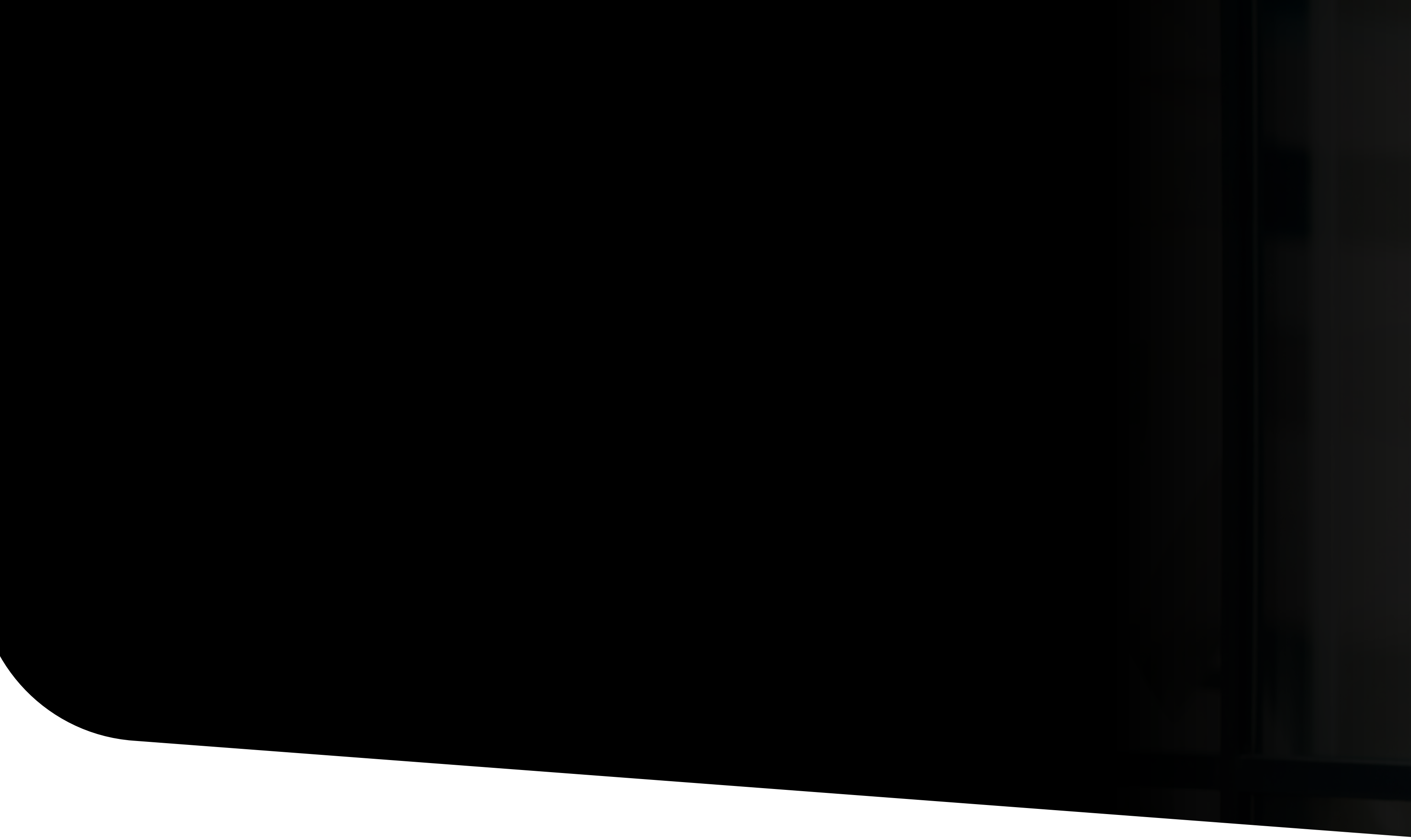
No matter your size or structure, Black Diamond has the flexibility, infrastructure, and power to support your unique wealth management business:

- RIAs
- Family Offices
- Breakaway Advisors
- Trusts
- Foundations
- Broker-Dealers
- Aggregators



For More Information

If you would like to learn how the Black Diamond Wealth Platform can support your business, call 1-800-727-0605 or email info@advent.com. You can also visit blackdiamond.advent.com.



The Black Diamond® Wealth Platform is an offering of SS&C Advent, a business unit of SS&C Technologies.

An award-winning, cloud-based solution, Black Diamond is designed to meet the complete business needs of wealth management professionals and their clients. Complete with performance reporting, portfolio rebalancing, an immersive client portal, and more, the platform also connects to a vast ecosystem of smart integrations. Proactive, personalized attention from a dedicated service team ensures advisors receive access to an elite combination of technology and service.

Financial management firms of all sizes leverage Black Diamond to streamline operations, deliver business insights, and connect with both prospects and clients to build long-lasting relationships.

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

SS&C | Black Diamond WEALTH PLATFORM

blackdiamond.advent.com | info@advent.com