SS&C | Black Diamond
WEALTH PLATFORM

A Complete Platform Enhanced by Our Partners

Exclusive Platform Partnerships

Build an end-to-end, best practice technology stack with the Black Diamond® Wealth Platform at the heart of your business.

The Platform Partners are a select group of solutions that have an exceptionally deep integration with Black Diamond. When choosing a Platform Partner to complement your technology stack, you gain access to an unparalleled ecosystem that includes:

- Connected Workflows
- Embedded Content
- Automated Data Syncs
- Unified Sales Support

Explore how the Platform Partners can enrich your experience by helping you save time, manage relationships, and attract new clients.

RIGHTCAPITAL
Financial Planning

SS&C | Salentica
Client Relationship Management

riskalyze
Portfolio Risk Analytics

SMArtX Advisory Solutions
Managed Accounts

Financial Planning

RightCapital enables you to simplify the planning process and differentiate your services

RightCapital is a next generation financial planning software that allows advisors to do more planning in less time with its innovative features. The drag and drop, plug and play functionality makes it easy to get started while enabling an interactive advisor and client experience.

Through the digitized client onboarding, an initial financial plan can be created in as little as 10 minutes. A powerful and robust calculation engine generates results quickly and accurately, providing confidence and flexibility for advisors. Tax, retirement, Medicare, budgeting, and more, the multi-generational platform delivers projections that help clients plan for different contingencies.

The perks of partnership

The flow of Black Diamond portfolio and account data into RightCapital powers comprehensive financial plans. This integration redefines the planning experience by saving time and enabling a more synchronized user experience.

With RightCapital and Black Diamond, advisors can:

- Create a comprehensive financial plan in minutes with client account and holding data
- Leverage advanced tax planning capabilities, such as Roth IRA conversion and tax efficient retirement distribution strategy thanks to the automatic import of cost basis of holdings
- See a real-time update of a client's financial plans since holding and pricing information is automatically updated daily
- Post financial plans directly to *Timeline* within the Black Diamond *Client Experience* portal.

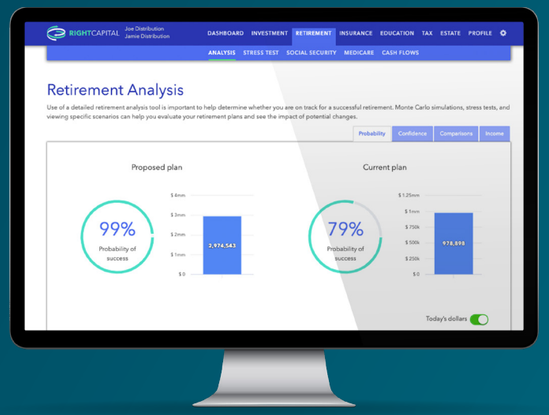
RIGHTCAPITAL

Accomplish more planning in less time through an innovative platform.

COLLABORATION
Compare multiple scenarios and illustrate stress tests through interactive tools.

DYNAMIC PLANNING
Show sophisticated projections and make adjustments on the fly.

SIMPLICITY
Present a plan that your clients can actually understand.



Client Relationship Management

Salentica CRMs put an incredible array of features right at your fingertips, with the ability to configure countless more.

Salentica's purpose-built CRMs are designed to handle the unique needs of financial services professionals. Working with firms of all sizes to automate repetition, dive deep into analytics, and integrate the very best tools to deliver the most powerful web-based financial CRM available.

Complete with industry-specific entities like relationships, portfolios, and financial accounts, advisors are better equipped to understand client needs, identify new opportunities, and address problems faster.

The perks of partnership

Instantly access Black Diamond's powerful reporting tools directly inside CRM. Or, contextual deep links allow for just a single click from the Salentica portfolio record into the corresponding Black Diamond portfolio. The seamless workflows reduce the need to toggle between windows, replicate data entry, and bring data offline.

With Salentica and Black Diamond, advisors can:

- Manage all client relationships in one place
- See aggregated AUM value directly in CRM
- View, filter, and report on the prior day's holdings inside CRM
- View recent reports along with daily account data on a scheduled or ad hoc basis
- Automate processes and elevate client service
- Access pre-built integrations with custodians and productivity applications to provide real-time, secure account data
- Contact Salentica and Black Diamond service teams who work together under one roof
- Leverage an ever-growing knowledgebase, in-app guided tutorials, and live one-on-one or team training

SS&C | Salentica

Grow quickly and efficiently with a purpose-built CRM designed specifically for the unique needs of wealth managers.

TAILOR-MADE SOLUTION
Offers advisor-friendly terms, custodial integrations, and visual workflow automation.

SYNCHRONIZED INTEGRATION
Over 100 available data points can be synced into Salentica from Black Diamond

CENTRALIZED KNOWLEDGEBASE
Provides detailed records for each client relationship accessible via any mobile device connected to the internet.

Portfolio Risk Analysis

Riskalyze aligns the conversation so risk makes sense to both you and your clients

Market fluctuations can result in emotional decision-making. To counteract this, Riskalyze invented the Risk Number®, which powers its risk Alignment Platform. The Risk Number is an objective, mathematical approach that removes subjectivity by quantifying an investor's portfolio risk. Financial advisors can use the Risk Number to drive conversations around how much risk investors can handle over the short term in order to meet long-term objectives.

Thanks to native integration, advisors can use Riskalyze's powerful risk alignment tools right inside of Black Diamond which allows them to effortlessly incorporate risk into their clients' complete wealth picture.

The perks of partnership

Advisors can use Riskalyze to accurately determine a client's risk tolerance level, then assess the client's current portfolio risk against their Risk Number. The unified experience makes it easy for advisors to quickly incorporate the risk component into client meetings and discussions.

With Riskalyze and Black Diamond, advisors can:

— Consolidate their technology into one centralized, integrated solution

— Enhance client dialogue by incorporating Riskalyze content into presentations and the *Client Experience* portal

— Monitor risk within client portfolios on a daily basis as part of the overall client dashboard

— Stay compliant by documenting an assessment and portfolio risk of a client

— Propose new portfolios to clients based on risk alignment goals

— Streamline support by having a single point of contact for both platforms

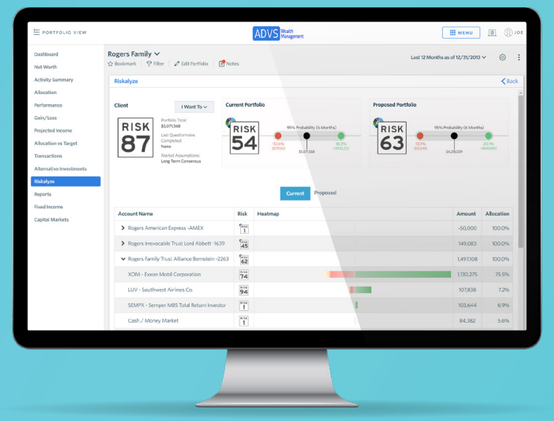
riskalyze

Set clear expectations with investors by objectively and quantitatively pinpointing portfolio risk.

PROACTIVE MONITORING
Track risk within client portfolios on a daily basis as part of the overall client dashboard.

DEEP INTEGRATION
Incorporate risk numbers, probability charts, and risk/reward heatmaps into Black Diamond.

STRESS TESTS
Stress test portfolios for a variety of stock and bond market scenarios.



Managed Accounts

SMArtX is the next evolution in managed accounts

As firms increase their reliance on technology to support the evolving relationship between advisors and investors, SMArtX delivers an integrated technology solution to drive productivity gains, grow independent channels, and facilitate the transition from commissionbased to fee-based accounts. SMArtX is a complete turnkey asset management platform that offers advisors unparalleled portfolio flexibility and customizable investment solutions to meet each investor's objective.

Custodian-agnostic, SMArtX provides multicustodial solutions across major institutions. The platform provides advisors access to traditional and alternative investment strategies as well as the ability to implement 3rd party and/or proprietary investment strategies through a Unified Managed Account (UMA). This gives investors access to multiple investment strategies with the benefits of a UMA/SMA structure. It's the first UMA/SMA platform providing advisors access to institutional quality managers across both traditional and alternative investment strategies, as well as individual securities, mutual funds, and ETFs, in a single brokerage account.

The perks of partnership

Our partnership makes it easier for financial advisors to utilize the power from both tools within a single wealth platform. By leveraging Black Diamond reporting with SMArtX's technology, the combined solution delivers a managed account experience like no other.

With SMArtX and Black Diamond, advisors can:

— Access SMArtX directly from their main Black Diamond dashboard

— Gain access to hundreds of investment managers and strategies

— Benefit from an automatic sync into Black Diamond inclusive of householding and sleeve account data

— Generate Black Diamond reports showing sleeve-level data from SMArtX

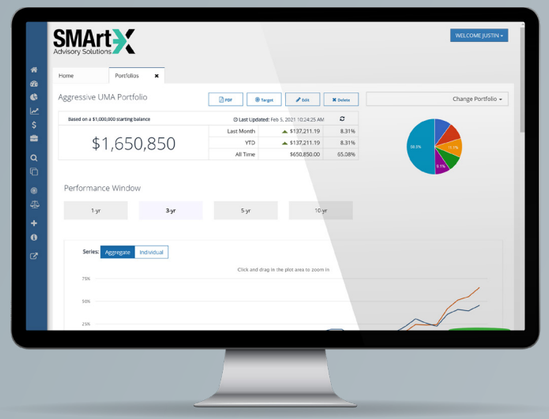
SMArtX Advisory Solutions

Save time and scale by managing traditional, alternative and index strategies in one account.

MANAGER MARKETPLACE
Access hundreds of 3rd party investment strategies from top managers.

UMA/SMA PLATFORM
Deliver customized multi-strategy portfolios to clients in a UMA/SMA structure.

DEEP INTEGRATION
Produce sleeve-level reporting in Black Diamond.



The Choice is Yours

Partnership with the featured solutions does not limit your choices. Rather, it highlights those we work especially close with to exceed your expectations.

Black Diamond makes integration investment a top priority. The complete, robust network features over 55 solutions from across the industry as well as 800+ custodial feeds. This way you have the freedom to select and connect the technology that best fits your firm's unique business needs.

To learn more about Black Diamond's extensive network of integrations, visit blackdiamond.advent.com.

> The flow of data we have is absolutely cutting edge, if there is a change, we only need to enter it one time and it gets updated across the platforms—everything talks to each other.

Clint Lewis
MANAGING DIRECTOR, DETALUS ADVISORS

55+
solutions

800+
custodial feeds

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

Black Diamond's innovative, cloud-based tools and best-of-breed integrations help you optimize your business and strengthen your connections with both your clients and prospects.

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.