Schroders Personal Wealth selects SS&C for Transfer Agency

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WINDSOR, Conn., Jan. 11, 2024 /PRNewswire/ -- SS&C Technologies Holdings, Inc. (Nasdaq: SSNC) today announced a new relationship with Schroders Personal Wealth (SPW), the financial planning joint venture between Schroders plc and Lloyds Banking Group. SS&C Global Investor and Distribution Solutions (GIDS) will be SPW's transfer agent. SS&C will provide fund registry, investor services and digital solutions for the full range of SPW's funds, with GBP12.7 billion in AUM.

Schroders Personal Wealth offers holistic financial planning solutions throughout the U.K., including retirement planning, investment management, estate planning and more. The firm delivers digital and face-to-face advice.

SS&C GIDS stood out as a platform with flexible ways of providing multi-channel services for SPW's clients.

"As a leading wealth management firm in the U.K., our goal is to continuously deliver an excellent client experience and to provide the highest quality of investor services," said Dominic Sheridan, CEO of SPW ACD. "SS&C GIDS' digital suite of products enables us to support oversight of the service delivery and simplify the onboarding and transaction experiences for our clients. We look forward to working with SS&C to take our offering to the next level."

"We are delighted to have been chosen to provide Schroders Personal Wealth with efficient transfer agency, digital investor capabilities and end-to-end operational support," said Damien Barry, Head of SS&C GIDS EMEA. "We are committed to delivering industry-leading technology and service to support SPW as the business continues to grow and are excited to embark on our new partnership together."

SS&C's end-to-end solutions offer unparalleled support for transfer agency operations, global compliance, and seamless connectivity for asset managers. Its best-in-class capabilities, advanced technology integration and an international team of experts streamline operations, reduce risk, and optimise data. Learn more here.

About Schroders Personal Wealth

Schroders Personal Wealth is a joint venture between Lloyds Banking Group and Schroders –two of the UK's largest names in banking and asset management. We were created to help more people across the UK benefit from financial advice. We have the advantage of solid foundations and a strong heritage. But we take a fresh, transparent and personal approach to financial planning. We aim to provide clients with clarity and transparency in everything we do. This includes using technology to explain how long-term financial planning can add value to peoples' lives; to give people access to information about their financial wellbeing, and to communicate with their adviser when it's convenient for the client. Our heritage may be 400 years old, but our approach is built for the future. For more information visit spw.com

About SS&C Technologies

SS&C is a global provider of services and software for the financial services and healthcare industries. Founded in 1986, SS&C is headquartered in Windsor, Connecticut, and has offices around the world. Some 20,000 financial services and healthcare organizations, from the world's largest companies to small and mid-market firms, rely on SS&C for expertise, scale and technology.

Additional information about SS&C (Nasdaq: SSNC) is available at www.ssctech.com.

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