



SmartStop Self Storage REIT Selects SS&C for Transfer Agency

November 29, 2023

WINDSOR, Conn., Nov. 29, 2023 /PRNewswire/ -- [SS&C Technologies Holdings, Inc.](#) (Nasdaq: SSNC) today announced that SmartStop Self Storage REIT, Inc. ("SmartStop"), a self-managed and fully-integrated self-storage company, has selected SS&C Technologies to provide transfer agency services for all of its sponsored REITs. SS&C will handle account owner recordkeeping, transactional activity, new investor onboarding and distribution.



"SmartStop is the largest public non-traded self-storage REIT in the U.S. with over \$2.9 Billion in assets. As our business continues to grow, we are always looking for ways to improve our economies of scale with excellent technology," said James R. Barry, Chief Financial Officer of SmartStop. "As a leader in transfer agency technology and services, SS&C brings an efficient and scalable operating model to our business. We look forward to working with SS&C's experts to meet the needs of our Managed REITs and their investors."

SS&C is the transfer agent to 18 of the top 20 non-traded REITs. In addition to transfer agency, SS&C offers comprehensive, modular real estate services to a wide range of real estate vehicles and legal structures globally. Additional services include fund administration and fund-level accounting, property management and property-level accounting and investment-level oversight, reporting and analytics.

"We are pleased to support SmartStop and their sponsored REITs as they grow," said Neal Chansky, Head of Registered Fund Services. "The real estate industry has a unique diversity of fund structures, fees, processes and regulatory requirements, and REITs in particular have been popular with retail investors. SS&C has extensive experience helping firms attract retail capital and navigate the complex system of intermediaries such as wirehouses, RIAs and broker-dealers. We are committed to supporting our clients with end-to-end solutions and industry guidance and expertise so they can spend less time on operational headaches and focus on generating returns."

Learn more about opportunities and challenges facing real estate funds [here](#).

About SmartStop Self Storage REIT, Inc.

SmartStop Self Storage REIT, Inc. ("SmartStop") is a self-managed REIT with a fully integrated operations team of approximately 500 self-storage professionals focused on growing the SmartStop® Self Storage brand. SmartStop, through its indirect subsidiary

SmartStop REIT Advisors, LLC, also sponsors other self-storage programs. As of August 10, 2023, SmartStop has an owned or managed portfolio of 192 operating properties in 22 states and Canada, comprising approximately 135,000 units and 15.3 million rentable square feet. SmartStop and its affiliates own or manage 33 operating self-storage properties in Canada, which total approximately 28,800 units and 3.0 million rentable square feet.

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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