



## Dimensional Fund Advisors Extends Transfer Agent Relationship with SS&C

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WINDSOR, Conn., Nov. 15, 2023 /PRNewswire/ -- [SS&C Technologies Holdings, Inc.](#) (Nasdaq: SSNC) today announced that Dimensional Fund Advisors (DFA), a global leader in systematic investing, has renewed its transfer agency agreement with SS&C Global Investor and Distribution Solutions (GIDS). Under this agreement, SS&C will render transfer agency services for Dimensional's '40 Act mutual funds, which currently manage \$461 billion in assets.



"We value our ongoing relationship with SS&C as a high-quality transfer agent," said David Kavanaugh, Global Head of Investment Operations. "We appreciate their commitment to technological advancement and shared objective to deliver the best possible experience for investors."

SS&C GIDS has been a service provider to various Dimensional funds for a decade. With the distinction of being the globe's largest transfer agent, SS&C GIDS offers a comprehensive suite of investor services. SS&C, as a full-service transfer agent, provides compliance oversight, institutional client services, expedited trade settlement, meticulous registration, and rigorous maintenance of client data, among other functions.

"We are honored to expand our valued relationship with Dimensional Fund Advisors," said Nicole Greene, head of SS&C GIDS, U.S. "At SS&C GIDS, we are unwavering in our commitment to pioneer state-of-the-art solutions and set unparalleled service benchmarks. We look forward to working with Dimensional Fund Advisors to support their growth in the U.S. and globally."

### **About Dimensional Fund Advisors**

Dimensional is a leading global investment firm that has been translating academic research into practical investment solutions since 1981. Guided by a strong belief in markets, we help investors pursue higher expected returns through a systematic investment process that integrates research insights with advanced portfolio design, management, and trading while balancing tradeoffs that can impact returns. Dimensional is headquartered in Austin, Texas, and has 14 global offices across North America, Europe, Asia, and Australia. As of September 30, 2023, Dimensional manages \$618 billion for investors worldwide. For more information, please visit [dimensional.com](https://dimensional.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](http://www.ssctech.com).

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