



SS&C's Black Diamond Wealth Platform Transforms Advisor Experience with Innovative Black Diamond CRM

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WINDSOR, Conn., Nov. 2, 2023 /PRNewswire/ -- [SS&C Technologies Holdings, Inc.](#) (Nasdaq: SSNC) today announced the latest advancement in wealth management technology, the Black Diamond CRM module, integrated into the [SS&C Black Diamond Wealth Platform](#).



Designed exclusively for wealth managers and advisory firms, the Black Diamond CRM module redefines the advisor experience by offering a comprehensive managed services solution to reduce the technology maintenance burden on advisors. This innovative module seamlessly complements SS&C's existing CRM solutions, [Salentica Elements](#) and [Salentica Engage](#), providing firms with a low-maintenance option while ensuring a smooth transition to enhanced customization capabilities.

Key features of the Black Diamond CRM module include:

- **InTouch:** Empowering advisors to engage with clients at the right moment, tracking and creating last and next client touchpoints, including emails, calls, and client review activities.
- **Account Opening:** Supporting both single and multi-custodial workflows, account opening integrations save advisors time and enable them to deliver a better client experience.
- **Time & Expense:** Enabling advisors to gain insights into time and resource allocations, facilitating assessment of the investment in client relationships, all with automated efficiency and profitability tracking.
- **Workflow Manager:** A comprehensive module streamlining and automating business processes efficiently through dynamic templates, approvals, checklists, and task management orchestration.
- **Robust Email Integration:** A native in-email app that bridges the gap between CRM and major email solutions, such as Outlook and Gmail, eliminating manual data transfers and synchronizing contacts, events, and tasks.

- **Pre-built Integrations:** Access to a curated catalog of custodial and advisor technology integrations, simplifying and automating the tech stack with support from Black Diamond's CRM experts.

"Black Diamond CRM incorporates robust CRM capabilities into SS&C's Black Diamond Wealth Platform and brings the power of the leading enterprise CRM platform to advisory firms of all sizes to fit their business," said Steve Leivent, Co-General Manager, SS&C Advent. "This latest enhancement complements Black Diamond's ongoing momentum, which recently brought to market a model marketplace, financial planning, and proposal generation functionality."

SS&C continues to drive excellence in industry-specific CRM solutions, with offerings spanning Salentica, [Tier1](#), and now Black Diamond, all aimed at building trusted relationships and enabling wealth management firms and investment banks to deepen and expand their book of business.

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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