



SS&C's Black Diamond Wealth Platform Expands Financial Planning Capabilities with RightCapital Collaboration

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WINDSOR, Conn., March 21, 2023 /PRNewswire/ -- [SS&C Technologies Holdings, Inc.](#) (Nasdaq: SSNC) today announced the launch of its new native financial planning experience within the SS&C Black Diamond Wealth Platform to cover the past, present and future of a client's financial life. The SS&C team designed the tool in close collaboration with RightCapital, a leading software company specializing in financial planning in the Wealth Management market.



"To further power Black Diamond functionality, we are leveraging RightCapital planning data. The partnership is one of the deepest integrations we've ever created," said Steve Leivent, Co-General Manager, SS&C Advent. "Together, we redefine the planning experience by saving time and enabling a more synchronized user experience —and significantly expands the capabilities within our already robust platform."

This two-way integration enhances one of the more popular integrations by natively pulling key financial planning data from RightCapital into Black Diamond's platform as account and portfolio information flow from Black Diamond to RightCapital. The continuous loop takes the advisor-investor dialogue to new levels by creating a seamless experience for the end user. This new integration goes beyond the typical surface-level integration by synchronizing the underlying platforms of both partners to enable deeper workflows in Black Diamond.

Anthony Cavataio, V.P. Technology Solutions, Consultant at Advisor Group, stated, "Not only does it provide a quick and easy way for financial advisors to view their client's plan details, but the end investor can also benefit from the integration. Providing our clients with the ability to see how their performance, asset allocation and goals tie together strengthens the advisor-investor dialogue and their overall relationship."

"Financial planning drives deeper conversations with clients around important life goals," said Shuang Chen, Co-Founder and CEO, RightCapital. "Being able to show financial plan details right from the Black Diamond client portal and mobile app means even more opportunities to collaborate with and strengthen client relationships."

The [Black Diamond Wealth Platform](#) is one of SS&C's leading financial technology solutions delivering wealth management capabilities to over 2,000 advisory firms. This holistic, cloud-native platform allows advisors to manage their client's complete

wealth picture through portfolio management, reporting, trading, rebalancing, risk management, and planning solutions, combined with fully outsourced daily reconciliation and data management services.

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.

About RightCapital

RightCapital's mission is to create Right Plans for Real People™. RightCapital is used by thousands of financial advisors to grow their practices and set their clients on the path to financial success. Founded in 2015, RightCapital is the fastest-growing financial planning software with the highest user satisfaction among advisors (Source: [The Kitces Report Volume 1, 2023](#)). For more information, visit <https://www.rightcapital.com>.

Additional information about

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