SS&C Launches GenAI-Powered Sales Enablement Solution for Thornburg Investment Management

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WINDSOR, Conn.--(BUSINESS WIRE)--Feb. 24, 2026-- SS&C Technologies Holdings, Inc. (Nasdaq: SSNC) today announced the launch of an innovative generative AI-powered sales enablement solution it developed with Thornburg Investment Management, Inc. (“Thornburg”). Integrated into customer relationship management (“CRM”) platforms, the tool provides sales teams with fast, consolidated access to critical financial advisor insights.

Leveraging GenAI, the application enhances the process for preparing for digital and in-person touchpoints with financial advisors by aggregating and summarizing content from multiple sources. Sales prep insights are surfaced directly within CRM systems, providing sales professionals with information in one place. The new tool is now available to Thornburg’s intermediary sales team and integrates with each salesperson’s calendar and email.

SS&C also collaborated with Thornburg to develop an advanced analytical model to prioritize advisors and advisor teams in each sales territory.

“The new ‘Sales Prep’ tool empowers our intermediary sales and marketing teams with actionable insights and unlocks efficiency," said **Jesse Brownell, Global Head of Distribution and Managing Director at Thornburg**. “SS&C’s solution helps Thornburg continue to provide a best-in-class experience to our advisor clients and enables more impactful client conversations.”

“Our collaboration with Thornburg exemplifies how SS&C can help clients leverage the power of GenAI,” said **Lee Kowarski, Head of Distribution Solutions at SS&C**. “Thornburg’s sales professionals can spend less time searching for information and more time building meaningful relationships with advisors. We look forward to continuing our work with Thornburg and with other clients on bespoke solutions that support distribution.”

SS&C Distribution Solutions business intelligence tools and data analytics enable asset managers to more effectively distribute their products through financial intermediaries. The product suite includes industry-leading data management (SalesConnect) and analytics (WalletShare) offerings, as well as bespoke sales enablement tools and consulting services. Learn more about SS&C’s Distribution Solutions offerings here.

About Thornburg Investment Management

Thornburg is an active, high-conviction manager of equities, fixed income, multi-asset and alternative solutions. As a privately owned firm with $55 billion in client assets (includes $53.3 billion in assets under management and $1.2 billion in assets under advisement) as of December 31, 2025, Thornburg serves institutions, financial professionals and investors worldwide. The firm offers mutual funds, ETFs, closed-end funds, separate accounts and UCITS funds. Thornburg was founded in 1982 and is headquartered in Santa Fe, New Mexico with additional offices in Hong Kong and London. For more information, visit www.thornburg.com or call 877-215-1330.

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. More than 23,000 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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