



SS&C Black Diamond Wealth Solutions' TAMP Exceeds USD 2 Billion in Assets

June 25, 2026

Demand for modular, integrated managed account services drives rapid advisor adoption

WINDSOR, Conn.--(BUSINESS WIRE)--Jun. 25, 2026-- [SS&C Technologies Holdings, Inc.](#) (Nasdaq: SSNC) today announced assets on SS&C Black Diamond Wealth Solutions' Turnkey Asset Management Platform (TAMP) have grown 2000% to over \$2 billion in its first year.

"The depth of investment solutions available through Black Diamond's TAMP has expanded what we can offer clients," said Harold Philipson, CFP®, MSFS, RICP®, Co-Founder and Advisor and Wealth Management Advisor at Tenzing Financial. "The platform gives us institutional-level capabilities without adding internal complexity."

The milestone reflects registered investment advisors' (RIA) growing demand for institutional-level portfolio management, tax efficiency, and customization on a single platform, without adding operational complexity or losing control of the client experience.

"Advisors are under increasing pressure to deliver sophisticated portfolios while managing rising operational demands," said Steve Leivent, Senior V.P. & Co-Head of SS&C Wealth & Investment Technologies. "The growth of our TAMP demonstrates firms want a model that allows them to outsource what slows them down while remaining deeply involved in investment strategy, client relationships and business growth."

The TAMP, powered by SS&C ALPS Advisors, is part of the broader Black Diamond Wealth Solutions ecosystem. The offering combines portfolio management, trading, reporting, CRM and alternative investment servicing in a unified platform built to support firms of all sizes. Unlike traditional TAMPs, SS&C Black Diamond offers a flexible approach to service adoption. Advisors using Black Diamond can integrate managed accounts, trading, model implementation, and tax-aware strategies in stages without leaving their platform environment.

This integrated model enables firms to:

- Scale portfolio management without adding headcount
- Improve operational efficiency through centralized trading and rebalancing
- Deliver tax-smart, customized portfolios
- Maintain visibility and control within a single ecosystem

SS&C Black Diamond continues to invest in its rebalancing tool, managed account services, and TAMP capabilities.

Enhancements planned for this year include:

- **Revamped Model Marketplace experience**
- **New Oversight Dashboard and Trade Desk Connection workflows**
- **Expanding asset manager partnerships, including new Separately Managed Account strategists**
- **AI-driven insights to provide enhanced transparency around trade proposals**

For more information on Black Diamond's Investment Management Services, visit <https://www.sscblackdiamond.com/solutions/investment-management/>

About SS&C Technologies

SS&C is a leading provider of mission-critical, AI-powered software and services empowering financial services and healthcare organizations to work smarter, faster, and securely. Founded in 1986, SS&C is headquartered in Windsor, Connecticut, and has offices worldwide. 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.sscotech.com.

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