



Bolton Global Capital Selects SS&C Black Diamond Wealth Solutions to Support Growth of International Adviser Network

September 8, 2026

Leading broker-dealer serving independent advisors chooses Black Diamond to deliver an integrated, scalable wealth management platform

WINDSOR, Conn.--(BUSINESS WIRE)--Sep. 8, 2026-- [SS&C Technologies Holdings, Inc.](#) (Nasdaq: SSNC) today announced that Bolton Global Capital, a FINRA member broker-dealer, has selected SS&C Black Diamond® Wealth Solutions to support its ongoing growth.

Bolton's selection reflects two accelerating shifts in wealth management: independent broker-dealers absorbing wirehouse breakaways, and rising demand for platforms that scale across sophisticated, cross-border client needs. Black Diamond's integrated state-of-the-art platform is built to serve both.

"As we continue to expand our network of independent advisors, we wanted a technology partner to scale alongside our business while delivering a seamless experience," said Matt Beals, President and Chief Operating Officer, Bolton Global Capital. "SS&C Black Diamond stood out for its comprehensive wealth management capabilities, intuitive client portal, and ability to bring together the technology components our advisors need to run their independent practices."

With over \$19 billion in assets under management, Bolton Global Capital provides technology and operational support to help independent advisors serve clients with complex international wealth management needs. Black Diamond's scalable platform will help streamline portfolio management, reporting, and advisor workflows. The firm selected Black Diamond for its comprehensive wealth management capabilities and integration with Morningstar research, data, and analytics, enabling advisors to access investment insights within their daily workflows. The firm is also expanding its use of the platform through Morningstar's Direct Advisory Suite (DAS) to deliver deeper portfolio insights to its end clients.

"As wealth management firms grow, they need technology to support increasingly complex business models," said Steve Leivent, Senior V.P. and Co-Head of SS&C Wealth & Investment Technologies. "Bolton Global Capital's selection of Black Diamond demonstrates our ability to support sophisticated firms serving advisors and clients with diverse needs with a modern, scalable platform combining portfolio management, reporting, and integrated investment research."

Bolton Global Capital joins a growing number of firms choosing SS&C Black Diamond Wealth Solutions to modernize their wealth management technology. To learn how SS&C Black Diamond Wealth Solutions can support your business, visit <https://www.sscblackdiamond.com/>.

About Bolton Global Capital

Founded in 1985, Bolton Global is the premier independent broker-dealer serving international and domestic clients with comprehensive wealth management capabilities. Bolton is a leader in providing access to US and global financial markets for Latin American and European Investors. For 40 years, Bolton has provided innovative solutions and unparalleled service to wealth managers and their clients. Bolton has over \$19 billion in assets under management as of August 2026.

For more information, visit www.boltonglobal.com.

About SS&C Technologies

SS&C is a leading provider of mission-critical, AI-powered technology 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.ssctech.com.

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Source: SS&C