



SS&C Enhances Wealth Management Offerings with Black Diamond AI

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WINDSOR, Conn.--(BUSINESS WIRE)--Sep. 10, 2026-- [SS&C Technologies Holdings, Inc.](#) (Nasdaq: SSNC) today released Black Diamond AI, a series of artificial intelligence-enabled enhancements for SS&C Black Diamond® Wealth Solutions. Black Diamond AI is part of SS&C's broader AI strategy, built on the SS&C AI Gateway governance platform and designed to interoperate with SS&C WorkHQ, the enterprise AI orchestration platform advisors and operations teams use across their SS&C footprint.

Black Diamond AI combines in-platform AI assistance, contextual insights, natural language data queries, and connected AI experiences to help advisors and operations teams reduce manual work, access relevant information, and act more efficiently.

"In a regulated business like ours, we don't adopt AI tools lightly," said Brian Boughner, CEO of Fiduciary Alliance. "Black Diamond AI's approach to security and compliance made it an easy decision, and our advisors picked it up quickly. The insights it surfaces let us get ahead of client questions instead of reacting to them. This intelligence changed how our advisors prepare for meetings and how confident they feel walking in."

Black Diamond AI is built around core capabilities, including:

- **Black Diamond Assist:** As the foundation for in-platform agentic AI, Black Diamond Assist helps users navigate the platform, answer questions, and access workflows.
- **Black Diamond Insights:** Proactive intelligence analyzes platform data to highlight relevant information and connections. Initial features include Relationship Summary, Reports & Statements Summary, Planning Summary, and Trades Analysis Summary.

Users can also ask questions about client and business data in plain English and receive immediate answers through natural language data queries, enabling teams to access information without searching through multiple reports or screens.

Additionally, Black Diamond's **Model Context Protocol** (MCP) server lets advisors securely access their Black Diamond data and act on it from their AI enterprise platform of choice.

"Black Diamond's AI capabilities help our advisors spend less time searching for information and more time focused on strategic guidance and meaningful conversations with clients," said Sean Hendler, Director, Performance Reporting at HB Wealth. "Black Diamond's new MCP server fits perfectly into our broader AI strategy, allowing advisors to seamlessly integrate quality Black Diamond data with information from other key sources," said Sean Hendler, Director, Performance Reporting, HB Wealth.

"AI should help advisors make faster, more informed decisions while simplifying day-to-day operations," said Steve Leivent, Senior V.P. & Co-Head of SS&C Wealth & Investment Technologies. "Black Diamond AI is how our AI strategy shows up for wealth advisors and is embedded where advisors do the work. Firms turn information into action while maintaining the trust and governance their clients expect."

Governance runs through SS&C AI Gateway, the enterprise-grade platform anchoring security, transparency, and responsible AI principles across SS&C's AI portfolio, including Black Diamond AI. For more information, visit ssblackdiamond.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.sscotech.com.

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