SS&C Black Diamond Expands Annuities & Insurance Marketplace with New Insurance Capabilities and Carriers

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Advisors now have access to term life quoting and policy review services, additional annuity and life insurance solutions from Jackson and Protective

WINDSOR, Conn.--(BUSINESS WIRE)--Sep. 16, 2026-- SS&C Technologies Holdings, Inc. (Nasdaq: SSNC), in partnership with DPL Financial Partners, today expanded insurance solutions within SS&C Black Diamond® Wealth Solutions' Annuities & Insurance Marketplace (AIM). New features provide fiduciary advisors access to term life quoting and insurance policy reviews. Additionally, Jackson National Life Insurance Company (Jackson®) and Protective Life Insurance Company (Protective) have joined AIM, increasing the platform's integrated carrier roster to seven. Jackson offers annuities designed for the RIA channel, helping financial professionals integrate tax-deferred growth, protected income, and retirement planning strategies into client portfolios. Protective provides annuity and life insurance solutions for both accumulation and protection needs.

“Financial professionals are seeking greater flexibility in helping clients prepare for retirement, and annuities can play an important part of that strategy,” said Alison Reed, Head of Distribution at Jackson National Life Distributors LLC, the marketing and distribution business of Jackson. “Jackson is committed to making it easier for financial professionals to do business with us, and we’re pleased to join Black Diamond’s AIM to expand access to our products within the RIA channel. We look forward to supporting financial professionals with products designed to meet their clients’ evolving needs.”

“By making our annuity and life insurance solutions available through Black Diamond's AIM, we're giving advisors another way to incorporate protection considerations alongside the broader planning conversations they're already having with clients,” said Lauren Drapeau, V.P., National Sales Director, Advisory Solutions at Protective. “The easier we can make it for advisors to address those needs, the better positioned they are to help clients prepare for whatever comes next.”

Other carriers on the platform include Allianz Life Insurance Company of North America, Midland National Life Insurance Company, MassMutual Ascend Life Insurance Company, Pacific Life, and Security Benefit Life Insurance Company.

New Insurance Capabilities

Advisors can now use AIM’s discovery, application, management, and billing capabilities across a wide range of protection products, in addition to fee-based annuities. The integrated Term Quoter allows advisors to quickly compare quotes from A and A+ rated carriers. An insurance policy review capability helps identify coverage gaps inside a client’s portfolio. The additions further enhance AIM’s toolkit, which also includes fee-based annuities and life, disability, and long-term care insurance.

“Insurance has been the last part of the client balance sheet advisors could see but not act on, with coverage sitting in a drawer or an annuity at a carrier while neither appears in the plan,” said Steve Leivent, Senior V.P. & Co-Head of SS&C Wealth & Investment Technologies. “With our expanded insurance offering, AIM closes that gap. Advisors can now quote term coverage, conduct in-depth policy reviews, and manage insurance as an advisory asset, all within their existing workflow.”

Recent AIM Enhancements

These expanded insurance capabilities are the latest in a series of AIM enhancements introduced since January:

- **Pre-Filled Applications** – Automated application data population across all participating carriers, reducing manual entry between discovery and submission.
- **Annuity Review** – Scalable review of legacy and held-away commission-based annuities, enabling advisors to identify eligible contracts across their entire book and convert them, as suitable, into billable, fiduciary-managed assets.
- **Enhanced Insurance Modeling and Reporting** – In-platform scenario modeling and client-ready educational resources to support protection discussions.

To learn more about managing insurance within AIM, schedule a demo at sscblackdiamond.com or contact the AIM Consulting Team at 1-888-680-0830.

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.

About DPL Financial Partners

DPL Financial Partners is modernizing annuities and insurance to meet the needs of RIAs, their clients, and individual investors. As the pioneer of commission-free annuities, DPL is removing legacy barriers and delivering a wide range of low-cost solutions from the nation’s leading carriers. Through Avenew®, its integrated platform, DPL offers a transparent, competitively priced marketplace—empowering advisors and investors with powerful tools to evaluate, compare, and seamlessly implement solutions designed for today’s financial planning needs. DPL supports more than 8,500 RIA firms directly and through integrations with leading wealth management platforms. Learn more at dplfp.com.

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Brian Schell
Chief Financial Officer
SS&C Technologies
Tel: +1-816-642-0915
E-mail: InvestorRelations@sscinc.com

Justine Stone
Investor Relations
SS&C Technologies
Tel: +1-212-367-4705
E-mail: InvestorRelations@sscinc.com

Media Contacts
Madison Gallo
Prosek Partners
E-mail: pro-SSC@prosek.com

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