

PRODUCT BRIEF

# You Don't Need Another Product. You Need a Partner.

Black Diamond is part of the LPL Financial Vendor Affinity Program.

**Financial management firms of all sizes leverage the award-winning Black Diamond® Wealth Solutions to streamline operations, deliver business insights, and connect with both prospects and clients to build long-lasting relationships.**

Black Diamond offers a fully-integrated cloudbased solution complete with performance reporting, portfolio rebalancing, an immersive client portal, and seamless connections to a vast ecosystem of smart integrations. Proactive, personalized attention from a dedicated service team ensures advisors receive access to an elite combination of technology and service.

As part of the LPL Financial Vendor Affinity Program, advisors can access Black Diamond's best-in-class portfolio management, reporting, fully outsourced daily reconciliation, and data management services at a more competitive price.

**“It was fantastic to work with both LPL and Black Diamond to create a powerful solution that works for our business model.”**

— **Jeremy Sorenson**  
Co-Founder, Aspen Private Advisors

**With Black Diamond, LPL advisors gain:**

- A partner who is looking out for you and ahead at industry changes
- Competitive pricing
- Innovative, cloud-based tools that strengthen connections with clients and prospects
- Best-in-class, reliable clean data that fuels client-ready dynamic reports
- Built-in integration options
- Dedicated, single point of contact service model

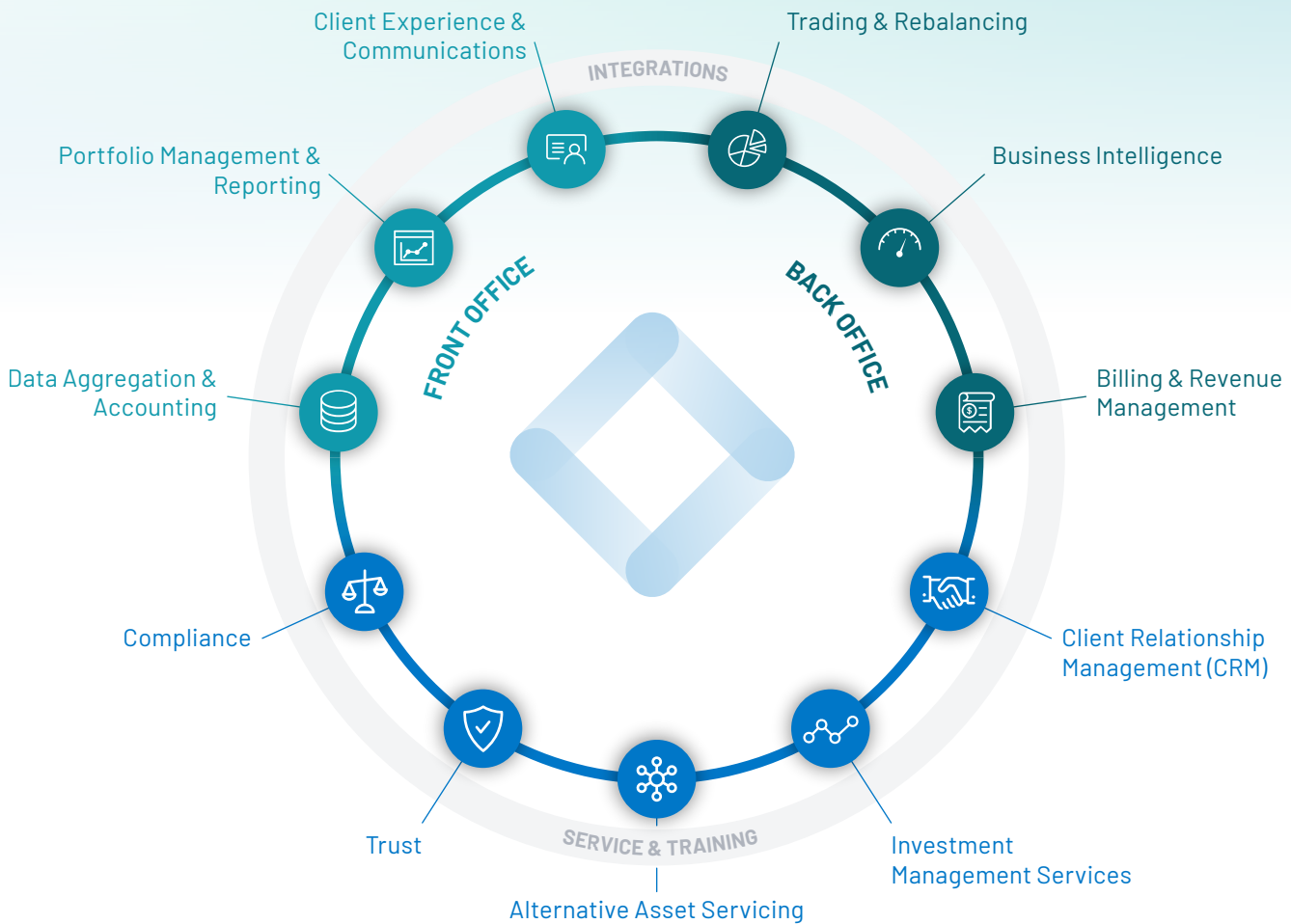
**We deliver cutting-edge solutions that drive your success:**

- Portfolio management
- Customized reporting needs for LPL advisors
- Immersive Client Experience
- Next-generation Rebalancer
- Intuitive dashboards
- Robust Billing
- And much more

**“At Black Diamond we know there is more to being a technology partner than just offering another product. This is why we have partnered with LPL to ensure your firm has a fully-integrated wealth management platform that will provide you with the unique reporting needed to be compliant and transparent, while also helping your firm achieve its growth goals.”**

— **Brian Justice**  
SVP, Senior Managing Director, Sales  
SS&C Black Diamond

At the Heart of Your Business: One platform to support your unique needs.



For more information

If you have questions about the LPL Financial partnership, or would like to learn how SS&C Black Diamond Wealth Solutions can support your business, call Jenny Schuster at 1-415-601-3829 or [jschuste@sscinc.com](mailto:jschuste@sscinc.com). You can also visit [sscblackdiamond.com](http://sscblackdiamond.com), call 1-800-727-0605, or email [info@sscblackdiamond.com](mailto:info@sscblackdiamond.com).

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