

Managed Account Service

SS&C Rendezvous

SS&C Rendezvous offers a comprehensive Managed Account Service solution designed to increase an advisor's value to their clients and reduce operational complexity.

Key Advantages of the Managed Account Service



Outsourced Trading & Execution

Rendezvous' institutional trade desk is the intermediary between clients and financial markets, dedicated to optimizing efficiency and portfolio performance. Through its expertise, cutting-edge technology, and industry relationships, the trade desk delivers superior execution, cost savings, and enhanced risk management.



Native Black Diamond Integration

Rendezvous' managed solutions platform is native to the SS&C Black Diamond Wealth Platform, ensuring compatibility with client reporting and servicing features.



Streamlined Operations and Time Efficiency

Advisors can delegate the complexities of order execution, compliance, and trade settlement, liberating their valuable time and resources. This empowers advisors to focus on their highest priorities, such as fostering client relationships, prospecting, and strategic financial planning, unburdened by day-to-day investment operations.



Comprehensive Investment Solutions

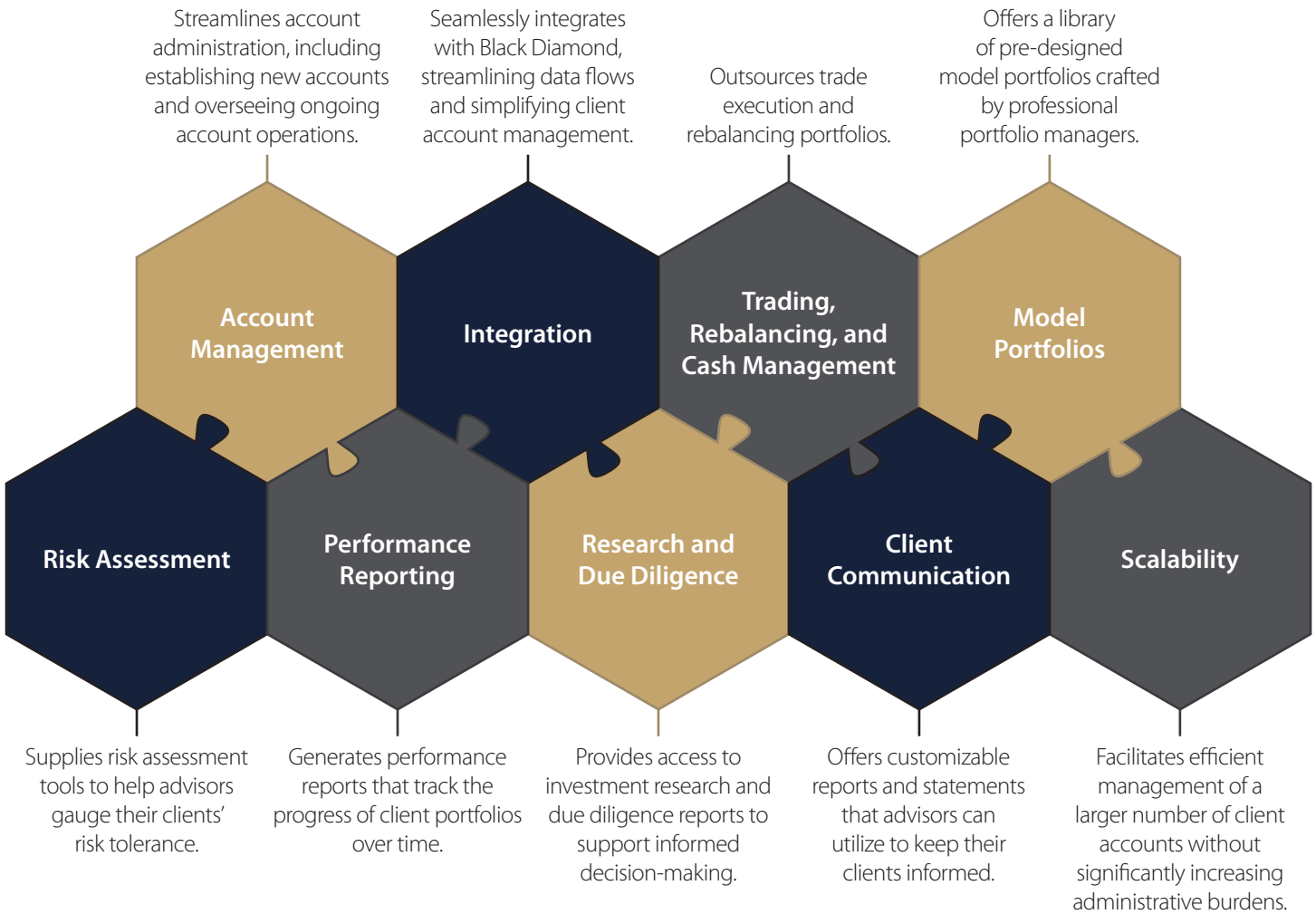
Rendezvous offers advisors the ability to integrate managed accounts with a high degree of customization and control, as well as full access to a goals-based model library designed by professional portfolio managers.



Competitive Fee Structure

We understand the importance of a cost-effective and transparent fee structure and therefore offer industry-competitive fee arrangements, ensuring that clients receive value for their investment while supporting an advisor's profitability.

Rendezvous offers a comprehensive solution designed to streamline the administration of managed solutions for financial advisors. Rendezvous aspires to enhance efficiency, elevate client service standards, and provide access to professional investment strategies, ultimately benefiting advisors and their clients.



For more information on how SS&C solutions such as Rendezvous and the Black Diamond Wealth Platform can support your unique advisory business, request a consultation today.

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