SS&C | RENDEZVOUS

SS&C Rendezvous and the SS&C Black Diamond® Wealth Platform

Providing wealth management advisors with a turn-key solution that delivers modern, time-saving tools focused on the client experience and investment goals.

HUMANIZE INVESTING | **DEMYSTIFY MODEL ALLOCATIONS** | **SIMPLIFY WORKFLOWS** | **RECAPTURE TIME**

How can SS&C Rendezvous and the SS&C Black Diamond Wealth Platform elevate your service?

Through seamless integration with Black Diamond, Rendezvous streamlines proposal generation and model assignment so that you can focus on your relationships.

- ✔ Investment and operational technologies
- ✔ Access to AI-driven client risk questionnaires
- ✔ Goals-based model recommendations
- ✔ Reduced back-office workloads
- ✔ Automated allocation and rebalancing workflows

alpsadvisors.com/rendezvous

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HUMANIZE

Automated and intuitive AI-driven client risk questionnaire streamlines investment proposal generation.

- Execute prospecting and dynamic financial planning within Black Diamond's modern and fully digital *Client Experience* portal.
- Create a client personality profile and leverage their reverse-constructed persona in assessing risk tolerance.
- Integrate existing client balances and goals to recommend a client-specific, goals-based trajectory of investment allocations.
- Enable a client-driven proposal generation process with investment allocation pre-approval that is easily shareable via Black Diamond's *Client Experience* portal.
- Leverage scenario analysis to help clients understand their portfolios in the context of the world around them.
- Incorporate tax-aware transitions for a more holistic and comprehensive model adoption process.

DEMYSTIFY

Integration of the Model Marketplace empowers advisors to showcase both Rendezvous and advisor-generated model recommendations.

- Unlock Rendezvous' model options across the objective and risk spectrum to fit client outcomes.
- Integrate advisor-designed models to supplement Rendezvous' model marketplace.
- Access model documentation and supporting analytics.
- Utilize client-oriented educational multimedia (including, but not limited to, podcasts, webinars and literature) to enhance the client experience.

SIMPLIFY

Leverage the full functionality, rebalancing capabilities and automated workflows of the Black Diamond *Rebalancer* to monitor the portfolio and support the advisor.

- Regain time currently spent manually adjusting client investment allocations.
- Integrate and automate rebalancing and dynamic planning workflows.
- Customize alerts and rebalancing constraints based on client preferences.
- Streamline continuous financial planning with automated proposal status checks and session queuing.

FOR MORE INFORMATION

Request a consultation to discuss your needs and learn how Rendezvous can help you take back your time.

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