

Tolerisk Enhances Integration With SS&C's Black Diamond Wealth Platform

Building on its existing Black Diamond integration, Tolerisk provides more portfolio granularity for advisors and their clients.

MARLTON, NEW JERSEY, UNITED STATES, October 10, 2023

/EINPresswire.com/ -- [Tolerisk](#), a

leading analytical risk-tolerance assessment software developer, is enhancing and further strengthening its integration with [SS&C's Black Diamond® Wealth Platform](#), an award-winning portfolio management platform for wealth management professionals.

The Tolerisk logo, featuring the word "TOLERISK" in a bold, blue, sans-serif font, with the "I" replaced by a green dollar sign. Below it, the tagline "The Science of Risk Tolerance" is written in a smaller, green, sans-serif font.

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Expanding our integration with Black Diamond builds upon our long-standing vision for the delivery of accurate and comprehensive financial advice.”

Mark Friedenthal, Founder and CEO, Tolerisk

The latest integration enhancements expand the data available to [advisors using the two platforms](#), pulling and mapping position-level data across interfaces. This new capability makes it easier for advisors to compare existing portfolios with portfolio proposals more thoroughly. The capability opens up opportunities for advisors to envision and create a more customized client experience aligned with clients' unique goals and outlooks.

Advisors using the two platforms already enjoy a custom notation feature that posts information directly to the Black Diamond Relationship Timeline communication tool,

as well as a one-click risk assessment build-out and tools designed to minimize manual data inputs.

“Each integration enhancement improves advisors' financial guidance and helps them grow their businesses,” said Justin Wayne, Director, Partnerships and Integrations for Black Diamond at SS&C. “This deeper integration with Tolerisk makes it easier for advisors to assess client positions within their portfolios, providing improved transparency and granularity across client accounts.”

Unlike traditional risk tolerance assessment tools, Tolerisk uses a scientific, multidimensional approach to risk assessment that quantifies an investor's willingness to accept investment risk,

validates advisor and client assumptions, measures the evolution of risk tolerance over time and provides best-in-class granularity and transparency—all within a single platform. These factors are layered into each risk assessment, providing advisors and their clients with simple, measurable, and actionable directives.

“Expanding our integration with Black Diamond builds upon our long-standing vision for the delivery of accurate and comprehensive financial advice,” said Tolerisk founder Mark Friedenthal. “We are pushing well beyond single-dimensional risk evaluation. Our multidimensional risk assessments strengthen advisor-client relationships, improve the feasibility of meeting and exceeding clients’ financial goals, and extend greater stability and effectiveness to advisors’ financial planning, portfolio reporting, portfolio analytics, and CRM capabilities.”

About Tolerisk

Tolerisk® is an analytical, multidimensional risk-tolerance assessment tool designed to improve and enhance advisor-client relationships through in-depth risk evaluations. In contrast with traditional risk tolerance assessment tools, Tolerisk measures a host of factors, including a client’s willingness and ability to take investment risk, client and advisor risk assumptions and the evolution of risk factors over time. For more information, visit <https://www.tolerisk.com/>.

About SS&C Technologies

SS&C is a global provider of services and software for the financial services and healthcare industries. Founded in 1986, SS&C is headquartered in Windsor, Connecticut, and has offices around the world. Some 20,000 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.

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