



CLIENT GUIDE

SS&C Platform Solutions

Working with your adviser to manage
your investments in one place

JULY 2026

ssctech.com

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An online system that works for you

Building and managing your wealth is about more than numbers on a spreadsheet. It's about making your goals a reality, whether that's retirement, supporting loved ones or simply getting more out of life. The SS&C Wealth Platform is all about supporting that process in partnership with your financial advice professional.

WHAT DOES THE SS&C WEALTH PLATFORM DO?

Over time, you can build up different investments and pensions in different places, which can make it hard to keep track of everything. SS&C helps with this by providing a platform, or digital service. This is used by financial firms such as your financial adviser to securely and safely manage your investments and pensions in one place.

At SS&C Platform Solutions, we deliver the platform and the technology that provides:

- Investment and tax wrappers. These are legal structures or products that 'wrap' around your investments like a shell, and govern how those investments are treated from a regulatory and tax perspective. Common tax wrappers include ISAs and pensions.
- The systems to keep your investments safe and secure
- Reporting, such as quarterly statements and tax packs
- Access to different types of investment such as stocks and shares and funds
- Access to third parties that work with your financial adviser to help manage your money

How it works

Your financial adviser can use the SS&C Wealth Platform to:

- Open an account
- Access important information about your investments
- Check performance and how much your investments are worth
- Help you choose from a wide range of investments and manage these on your behalf. The platform provides access to electronic trading in over 8,000 funds, listed securities and exchange-traded funds, and also offers access to both UK and international investments.

All of this provides peace of mind that your money is in safe hands. Your adviser can also use the platform to build your wealth in a tax-efficient way. The SS&C Wealth Platform is operated by SS&C Platform Solutions.

Products available

Self-Invested Personal Pension (SIPP)	This type of pension allows you and your adviser to control the specific investments that make up your pension fund, including UK and international assets.
Individual Savings Account (ISA)	A Stocks & Shares ISA can be used to invest a set amount each tax year. With an ISA, you don't pay tax on any interest or income you make.
Junior Individual Savings Account (JISA)	A tax-efficient account to invest on behalf of under 18s.
Onshore and Offshore Bonds	These investment-linked products can be used for extra tax planning or as a way of helping with inheritance planning.
General Investment Account (GIA)	This account can be used to hold different types of investments outside of the products listed above.

Please note: Tax treatment depends on your individual circumstances and may change in future.

Who we are: Modern technology backed by a global business

SS&C Platform Solutions is part of SS&C Technologies, a global business which helps to shape the future of investing and healthcare through technology.

SS&C was founded in 1986 and is headquartered in Connecticut, US. It now administers over \$2 trillion in assets globally, and has over 100 offices in 35 locations worldwide.

The business is a publicly traded company listed on the US NASDAQ stock exchange under stock ticker code SSNC. Up-to-date share price details are available on the public NASDAQ website [here](#).

SS&C acquired Hubwise in December 2021, creating the SS&C Wealth Platform of today. The platform holds over £13 billion of customer assets and administers over £25 billion in total. It is trusted by over 140 financial advice firms and 51,000 investors in the UK.

SS&C and SS&C Platform Solutions are independently rated by third parties to assess their financial strength. These ratings indicate how financially stable and reliable a company is. SS&C Financial Services International has been rated by Dun & Bradstreet as 5A.1, meaning it is a large scale company with the lowest risk of business failure.

Overall, this means we can provide you with a digital-first service, backed by expertise in the UK market.

IN NUMBERS

SS&C and SS&C Platform Solutions

\$2 Trillion in assets under administration globally

100+ offices in 35 locations

SS&C administers over **£250 Billion** of client investments on behalf of leading wealth management firms in the UK

The SS&C Wealth Platform administers over **£25 Billion** of the total assets under administration in the UK

Over **140** advice firms trust SS&C Platform Solutions with their clients' money

51,000 investors in the UK serviced by SS&C Platform Solutions

SS&C Financial Services International rated by Dun & Bradstreet as **5A.1**, representing the lowest risk of business failure

Notes: Information correct as at July 2026

What sets the SS&C Wealth Platform apart

The SS&C Wealth Platform is one of several platforms financial advisers can choose to work with on behalf of their clients. Here are some of the features that could mean the SS&C Wealth Platform is a good fit for you:



Designed with you in mind

The way we work with advisers means they have shaped the platform based on the needs of clients like you. The service may be led and branded by your adviser; in either case it is our technology that powers the platform.



Proprietary digital technology

Because SS&C owns its own technology, the platform can react more quickly to changes in government policy or regulation. This set-up should make the system easy for your adviser to use as well. We also partner with financial advice firms to continue to invest and develop the service on an ongoing basis.



Independence

As an independent technology company, we have no vested interest in where you invest your money. You trust your adviser to make suitable recommendations on your behalf. Our technology means advisers can choose the investments and pensions that suit your needs without constraint.



Commitment to best practice on IT and cybersecurity

We believe safeguarding your money and keeping your data safe and secure go hand in hand. As a wider business, SS&C is certified to meet the globally recognised standard for information security, taking into account people, processes and technology.

A safe home for your money

Beyond the scale of our parent company SS&C, SS&C Platform Solutions is a regulated financial company in the UK. As such, client money is kept separately from company funds, and we strictly follow rules set by the financial regulator the Financial Conduct Authority to keep your assets safe.

Who does what

SS&C Platform Solutions offers the Platform and also acts as a **Custodian**, which is the organisation responsible for holding and safeguarding your money and assets.

The full legal title of the Custodian is Hubwise Securities Limited (company number 06071374, Financial Conduct Authority firm reference number 502619). It also acts as product provider for some of the products set out in the table on page 3 (SIPP, ISA, JISA & GIA), and is a SIPP Trustee.



In line with SS&C's Treasury Management Policy, uninvested client money is held with UK banks, including:

- Lloyds Bank Corporate Market
- Barclays
- NatWest
- Bank of Scotland
- Santander

In the event a bank fails, clients may be eligible for compensation under the Financial Services Compensation Scheme (FSCS), covering up to £120,000 of any loss.

With investing, your money is held by the investment providers you and your adviser have chosen. Investments that are FSCS protected are also covered up to £85,000 per provider, though bear in mind this doesn't cover poor investment performance.

It is rare that banks and investment providers fail or go out of business, but it is good to know that if this were to happen protection is in place.

Full details about the FSCS can be found on its [website](#).

Next steps

Your adviser will be able to create illustrations and comparisons for you to see the benefit of the SS&C Wealth Platform being used to manage your investments.

Find out more

SS&C Platform Solutions works in partnership with financial advisers. You may have had a conversation with your adviser already about using a platform and the role SS&C plays as the technology provider behind the system and as the custodian.

If you have any questions about what a platform does, or about SS&C Platform Solutions as a business, it's best to speak to your adviser in the first instance.

You can also find out more about our parent company SS&C on our website.

■ For more information, visit ssctech.com

