



DPL Member Profile:

Colin Day
Correct Capital Wealth Management

AUM: \$600M
Type: Independent RIA



Problem

As Correct Capital began their transition to independence, they sought a comprehensive portfolio management and reporting platform and a solution for reviewing and managing their clients' 100+ annuities — all in a fiduciary capacity.

Solution

Advent Insurance Marketplace Powered by DPL (AIM)

Outcome

Through the partnership between SS&C and DPL Financial Partners, Colin could now access a technology-enabled solution. Correct Capital can leverage AIM to transition their legacy annuity business, grow it by having easy, instant access to key data and product information, and identify better solutions through DPL's product discovery tools.

“AIM helps us holistically scan the insurance marketplace. We can then serve our clients as true consultants in a meaningful and effective way.”

- Colin Day, DPL Member

How To Think About the Advent Insurance Marketplace Powered by DPL



Integrated Experience

SS&C Advent technology integrates directly into the advisors' desktop, allowing for a seamless user experience.



Growth Opportunity

The Marketplace provides a technology experience that can accommodate growing annuity business at your firm.



Enhanced Client Service

The “Client Experience” portal centralizes clients' information, making everything easily accessible.

What is the Advent Insurance Marketplace?

The Advent Insurance Marketplace (AIM) gives advisors direct access to no-load annuity products, designed to provide benefits for clients and advisors alike. AIM empowers fiduciaries to utilize Commission-Free products by providing access to the education and supporting tools needed to use them effectively. DPL's insurance technology integrates with SS&C Advent's advisory portfolio management and accounting solutions to deliver a ground-breaking solution.

To learn more about the Advent Insurance Marketplace and how to access it, call 888.680.0830 to speak with a DPL Consultant.