Advent Insurance Marketplace
Powered by DPL Financial Partners

Access fiduciary insurance solutions right from your desktop

Today, clients expect holistic financial planning and wealth management services from their advisors, making insurance a critical tool in the fiduciary advisor's toolkit. SS&C Advent has partnered with DPL Financial Partners to build the award-winning Advent Insurance Marketplace Powered by DPL (AIM).

How AIM Works

Powered by DPL's market-leading insurance platform for RIAs, AIM offers a wide range of insurance and annuity products, as well as the education and supporting tools you need to use them in your holistic planning process.. Through AIM, a team of licensed insurance consultants facilitates the issuing of policies on your client's behalf. As your client's advisor, you manage the account like any other advisory asset through your SS&C Advent portfolio management and accounting platform.

Use AIM to

- Mitigate risk in the portfolio
- Generate efficient, guaranteed retirement income
- Bring held away assets under your fiduciary management
- Repurpose legacy annuities to improve client outcomes in the financial plan
- Enhance client communication with product discovery, modeling, and reporting tools

Commission-Free Annuities

AIM provides direct access to low-cost, no-load annuity products from leading carriers, allowing you to deliver secure retirement income, principal protection, risk mitigation, and other meaningful benefits to your client's financial plans.

Best-In-Class Insurance

Meet your clients' needs for life, disability, and long-term care insurance through AIM. AIM consultants can walk you through the options and recommend the products and features best suited to your client.

Seamless Integration with SS&C Platforms

DPL's insurance technology integrates with SS&C Advent's advisory portfolio management and accounting solutions, including the Black Diamond® Wealth Platform, Advent Axys®, and the Advent Portfolio Exchange® (APX). Advisors can also leverage the Advent Custodial Data feed to access enhanced insurance reporting. This integration allows you to share a complete financial picture with clients, including a full reconciliation of accounts, position and transaction data, and fee calculations.

> "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, CFP® and Financial Advisor, Correct Capital Wealth Management

Contact Us

For more information on how to grow your business and deliver better client outcomes with the Advent Insurance Marketplace, contact the AIM Consulting Team at 1-888-680-0830 or email us at AIM@dplfp.com.