

# SS&C EVOLV: Solve today's challenges, meet the demands of tomorrow

We combine software and services to solve the accounting, reserving, and credit requirements of all classes of cash-flow-based financial instruments.

## Evolving business needs

Many institutions turn to spreadsheets to meet changing requirements and fill the gaps between systems. While this approach may meet the requirements in the short-term, it will lead to inefficiencies, operational risk, and is unsustainable in the long-run. An over-reliance on manual processes, combined with large datasets and multiple reporting perspectives can limit an institution's ability to perform analysis, leading to a lack of transparency, delays to the accounting close, and increased risk of misstatement.

## The rules are always changing

Whether a result of new reporting requirements, a growth-related opportunity, or a strategic objective, financial institutions are frequently confronted with a changing landscape. If history is any indication of the future, we can expect that business needs will continue to evolve.

## A strategy for success

SS&C EVOLV's integrated risk and finance solution, EVOLV, is a long-term sustainable solution to the evolving business landscape. A key differentiator for some of the most prominent financial institutions, EVOLV enables our clients to adapt to changing business needs, operate more efficiently, make better business decisions, and capitalize on growth opportunities in a controlled environment.

### **Purposely built to adapt**

Built on a foundation of reusable software, EVOLV is built to adapt.

- Flexible: fits within financial institutions' enterprise architecture
- Extensible: new functionality is extended from the same core platform
- Integrated: modular components are integrated across one platform
- Future-proof: delivery model enables automatic functionality updates

# Solutions

## Risk and finance made easier

Comprehensive and complementary modules streamline accounting, reserving, and credit functions in a single system, eliminating the need to integrate disparate processes.

Accounting	Reserving	Credit
<p>Eliminate manual processes by automating data management, calculations, and reporting.</p> <ul style="list-style-type: none"><li>• ASC 310-20 (FAS 91)</li><li>• ASC 948-10 (FAS 65)</li><li>• ASC 825-10 (FAS 159)</li><li>• ASC 805 (FAS 141R)</li><li>• TDR identification</li><li>• Nonaccrual / charge-off</li></ul>	<p>Automate the end-to-end reserving process and capture critical credit information via a controlled workflow.</p> <ul style="list-style-type: none"><li>• ASC 450 (FAS 5)</li><li>• ASC 310-10-35 (FAS 114)</li><li>• ASC 310-30 (SOP 03-3)</li><li>• CECL</li><li>• IFRS 9 Impairment</li><li>• Attribution analysis</li></ul>	<p>Execute advanced risk analytics and consolidate data and models from all lines of business.</p> <ul style="list-style-type: none"><li>• Credit concentration analysis</li><li>• Model execution platform</li><li>• Specific review workflow tool</li><li>• Scenario analysis</li><li>• Sensitivity analysis</li><li>• Credit stress testing (CCAR/DFAST)</li></ul>

## Key features

Domain-aware enterprise-grade software designed to meet the needs of financial institutions.

### **Controlled**

Embedded preventative and detective controls, including control totals, error reports, audit trails, reconciliations, and segregation of duties

### **Scalable**

Built on hybrid cloud architecture with massive parallel processing and grid computing

### **Flexible**

Customized adapters and accelerators for all major servicing and core banking systems

### **Extensible**

Extensions made through our Software Development Kit (SDK) can be modified or changed without impacting core functionality, resulting in faster updates with minimal downtime

### **Integrated**

Modular components are integrated across one platform

### **Future-proof**

Software as a Service (SaaS) delivery models enables automatic system updates without disruptive on-site upgrades

## Industry-tested software

Industry-leading financial institutions rely on SS&C EVOLV every month. EVOLV withstands the high degree of scrutiny and review associated with financial statement estimates and integrates with existing controls and audit processes.

~\$1 TRILLION ASSETS ON EVOLV

13 OF THE TOP 30 BANKS

OVER A DECADE OF RESEARCH  
AND DEVELOPMENT

24/7 CUSTOMER SUPPORT

200+ SYSTEM IMPLEMENTATIONS

SOC 1 TYPE II AND SOC 2 TYPE II

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## Services

Subject matter experts uniquely qualified to handle complex business scenarios and challenging operating environments

### Professional services

Our team of experts has extensive experience assisting financial institutions with their most critical needs.

#### Advisory

Related to all finance and accounting needs of financial instruments

#### Training

Ensures each customer makes the best use of EVOLV's features

#### Implementation

Dedicated team configures the system per the client's needs

#### On-demand support and outsourcing

Risk and finance processes, including accounting close, stress testing, and reserving

### Our competitive edge

We combine software and services to address the changing business needs of financial institutions.

#### Sustainable

Solves for the immediate need and provides long-term support for future strategic initiatives

#### Repeatable

Leverages automated tools, ensuring consistent and accurate results across portfolios and transactions

#### Auditable

Accepted by all major U.S. accounting and audit firms

#### Transparent

Includes powerful, granular analytics enabling better business decisions

# Experience matters

SS&C EVOLV is part of SS&C Technologies, a leading cloud-based provider of services and software with more than 10,000 customers worldwide.

## About us

Our team of over 300 highly qualified technology, risk, and finance professionals combines industry knowledge and experience with our innovative software platform to support the most critical risk and finance processes of industry-leading financial institutions.

## The support you need, when you need it

Our team of dedicated support professionals is available 24x7. We are committed to helping customers get the information they need, whether it is a question about EVOLV or their financial results, so they can focus on running and growing their business in an increasingly complex environment.



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