

SS&C ALPS ADVISORS AND TIFIN UNVEIL INNOVATIVE DONOR-ADVISED FUND PROGRAM

DENVER, CO – November 19, 2025 – SS&C ALPS Advisors, a wholly-owned subsidiary of SS&C Technologies Holdings, Inc. (Nasdaq: SSNC), has partnered with TIFIN Give, part of TIFIN’s ecosystem of wealth technology platforms, to launch an innovative white label donor-advised fund (DAF) program. The solution enables wealth managers, family offices and advisors to redefine the role of philanthropy and gifting within their clients’ investment strategies. The program helps firms evolve in step with their clients and families as the next generation of wealth takes shape.

“This partnership marks an important step forward in modernizing charitable giving infrastructure,” said Paul Lussow, CEO of TIFIN Give. “TIFIN Give and SS&C ALPS Advisors have joined forces to launch a next-generation white label DAF platform built for growth and scale. The platform enables partner firms to fully own the client experience. The turnkey solution combines TIFIN’s innovation and digital engagement capabilities with SS&C’s operational depth and reliability. The result is a scalable way to grow assets, strengthen relationships and elevate the role of giving in wealth and asset management.”

Donor-advised funds (DAFs) empower individuals and families to contribute assets with ease, build charitable wealth and shape lasting legacies across generations. For wealth managers, family offices and advisors, DAFs are more than a platform—they are a strategic tool that strengthen client relationships, improve retention and support tax-efficient asset growth.

“Our platform enables partner firms to deliver a seamless, digitally driven charitable giving experience to their clients. Purpose-built to strengthen multigenerational relationships, it elevates the next generation’s involvement in legacy/wealth planning and drives growth while remaining custodian-agnostic,” said Eric Hewitt, Chief Investment Officer of SS&C ALPS Advisors. “Together with TIFIN Give, we’re making charitable giving more accessible and strategic.”

United Advisor Group has chosen the White Label DAF Program as its dedicated philanthropic technology solution. “Families can structure charitable giving strategies that align seamlessly with their financial objectives, investment philosophy and legacy planning by leveraging our advisors and this innovative DAF technology,” said Ray Gettins, Director of United Advisor Group. “We’re excited to be an early adopter of the strategic DAF platform.”

This collaboration reflects TIFIN’s ongoing work to bring connected, intelligent capabilities into wealth management in ways that make planning purposeful, personalized and scalable.

[Discover the SS&C ALPS Advisors White Label Donor-Advised Fund Program, where giving meets strategy.](#)

Important Disclosures

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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. More than 23,000 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. Additional information about SS&C (Nasdaq: SSNC) is available at www.ssctech.com.

About SS&C ALPS Advisors

SS&C ALPS Advisors, a wholly-owned subsidiary of SS&C Technologies, is a leading provider of investment products for advisors and institutions. With over \$31.84 billion under management as of September 30, 2025, SS&C ALPS Advisors is an open architecture boutique investment manager offering portfolio building blocks, active insight and an unwavering drive to guide clients to investment outcomes across sustainable income, thematic and alternative growth strategies. For more information, visit www.alpsadvisors.com.

About The TIFIN Group LLC

TIFIN is a platform of products and companies that apply AI for financial services, with a focus on wealth management, asset management and insurance. TIFIN's companies include Magnifi, TIFIN @Work, TIFIN Sage, TIFIN AG, TIFIN AMP, TIFIN Wealth, Helix, Give and TIFIN AXIS. TIFIN is backed by leading investors including J.P. Morgan, Morningstar, Hamilton Lane, Franklin Templeton and SEI, among others.

Give, a TIFIN company, is a donor-advised fund (DAF) platform that enables wealth firms to grow assets and strengthen relationships through modern philanthropy. By engaging the next generation, offering unmatched investment flexibility, and integrating tax-efficient strategies, TIFIN Give turns charitable giving into a strategic lever for client retention, acquisition, and expansion.

About United Advisor Group

United Advisor Group (UAG) is a Registered Investment Advisor built by advisors for advisors. Our primary mission is to empower financial professionals to achieve financial independence while providing their clients with top-tier financial support. We prioritize a client-first approach, ensuring that families can navigate their financial journeys towards freedom with confidence, without the intrusive distractions of proprietary products. At UAG, our governance is in the hands of our advisors, creating a direct link between their success and the satisfaction of the families they serve.

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