


# Win new business with speed and precision.

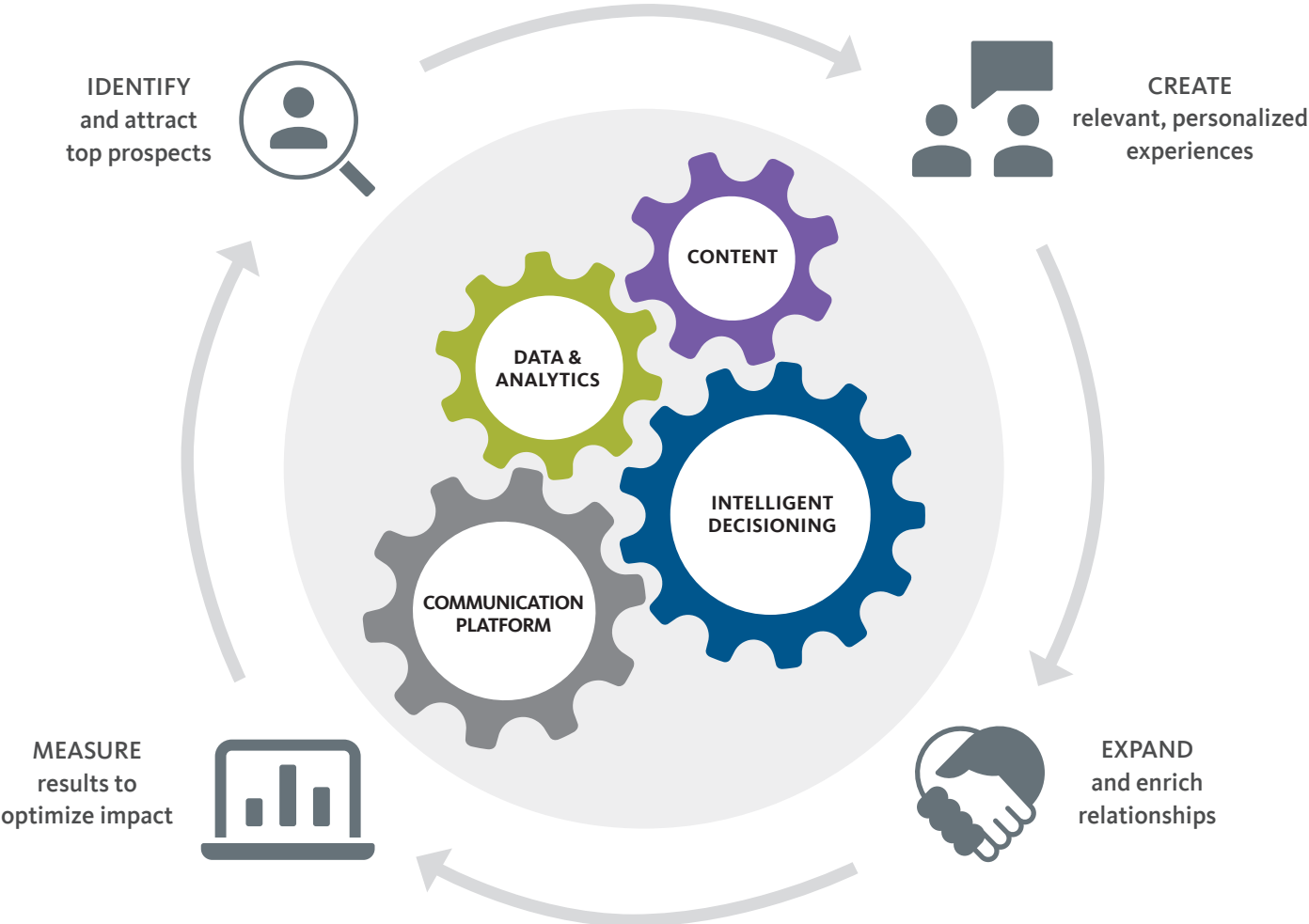
Next-generation marketing technology designed  
to support advisors and supercharge growth.

A photograph of four business professionals (three men and one woman) standing on a modern, glass-enclosed staircase in a corporate building. They are engaged in conversation. The woman is wearing a black and white patterned dress, and the men are in suits. The staircase has a glass railing and metal steps. The background shows a bright, modern office interior with a grid ceiling and recessed lights.

Your team works hard to attract the right prospects, establish trust and demonstrate value. Now, there's a better way to drive your sales and marketing. See what happens when targeted content, artificial intelligence and data analytics work together on your behalf.

# One platform. Endless opportunity.

Intense competition, savvy investors and information overload make it hard to stand out. Broadridge understands. That's why we developed a comprehensive suite of solutions designed to systematically propel the entire marketing ecosystem.



When you understand your clients, you can meet them on their terms—and exceed expectations at every step.

# Transform the entire marketing ecosystem.

Whether you need to tackle highly-specific challenges or build an entirely new marketing infrastructure, Broadridge offers flexible implementation options to help you achieve your goals.



## **BETTER DATA. DEEPER INSIGHT.**

Take advantage of the industry's largest organic marketing database with access to detailed consumer profiles, shareholder data and more. Fully integrated data aggregation, normalization and validation processes deliver enhanced transparency and a consolidated 360-degree view of each client account. Then, machine learning enables advanced analytics with segmentation, modeling and reporting.



## **SHARPEN PROSPECTING. OPTIMIZE CONVERSIONS.**

Unlock the power of artificial intelligence to make smarter decisions, forge stronger connections and enrich existing relationships. Prospect-fit tools help hone your acquisition strategy, so you can boost ROI. An innovative recommendations engine chooses the most relevant content, automatically. Then, algorithm-based distribution engages prospects and clients at just the right cadence.



## **START A CONVERSATION. MAKE AN IMPACT.**

Deliver relevant, useful content to inform and empower your clients. A huge library of custom content makes it easy to share calculators, market summaries, newsletters and seminars. Tap into more than 3,000 FINRA-reviewed resources, including 2,300 articles organized by 17 life events and 10 financial goals. All content is continuously updated to reflect industry trends and best practices.



## **SYSTEMATIZE ENGAGEMENT. AUTOMATE SUCCESS.**

Our integrated, user-friendly platform enables end-to-end campaign management — all in one place. Now, you can connect with clients on any device when they want, via the channels they prefer: web, social, email, mobile and print. Plus, response capture, automated feedback and traffic analytics lets you make critical adjustments in real time.

# Empower the next-gen advisor.

Recruit and retain top advisor talent with powerful technologies that help advisors work smarter and modernize their practice.

## DATA AND ANALYTICS

Wealth Insights Services  
Performance Analytics  
Database Services  
Marketing Database  
Data Aggregation and Financial Reporting  
Client Information Management  
Account Aggregation/Householding  
Proxy Shareholder Data  
Regulatory and Compliance Data  
CRM Data Integrations

## CONTENT

2,300 FINRA-approved Articles  
Advisor Resource Center  
eCards  
Market Summaries  
Industry Trends  
Seminars  
Newsletters  
Continuing Education  
200+ Interactive Calculators  
300+ Presentations

## INTELLIGENT DECISIONING

Broadridge Smart Insights Intelligent Prospecting  
Artificial Intelligence and Machine Learning  
Segmentation  
Advanced Analytics and Reporting  
Systematic Prospecting  
Modeling  
Google Analytics  
Next-Best Action Recommendations  
Trigger Alerts

## COMMUNICATION PLATFORM

End-to-end Campaign and Lead Management  
Custom Integrations  
Advisor Website  
Subscriptions  
Professional Services  
Sponsored Name Placement  
Local Business Listings  
Investor and Advisor Mailbox  
Email and Direct Mail  
Digital Delivery

**READY TO TAKE THE NEXT STEP?** Contact your Broadridge representative today: +1 855 252 3822.

Broadridge, a global Fintech leader with over \$4 billion in revenues and part of the S&P 500® Index, provides communications, technology, data and analytics. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth.

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Ready for Next

Communications  
Technology  
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