

Go beyond accurate

Elevate the performance of your entire enterprise with verified, actionable intelligence.

Client service is only as good as the data that powers it—so it's essential to get it right. Broadridge provides a single, golden source of data that underpins all client interactions, helping drive greater productivity, efficiency and insight.

SEE MORE. DO MORE. EXPECT MORE.

Today's modern enterprise is inundated with data, yet firms struggle to gain a holistic, consolidated view. Broadridge understands. Building on our Investigo legacy of clean data, comprehensive sourcing and actionable insights, Broadridge Data Aggregation and Financial Reporting is the only solution to offer you a true competitive advantage.

SEE MORE: Better data means next-level insight.

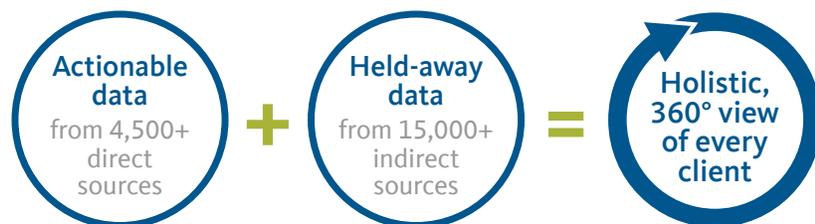
Trust the highest quality data

- **CLEANSING**
- **NORMALIZING**
- **STANDARDIZING**
- **RECONCILING**

FOR OVER
99.9%
ACCURACY

GAIN A COMPLETE, 360° VIEW OF EVERY CLIENT

We combine actionable data, historical and direct data feeds, with third-party sourcing to give you visibility into every asset type, including held-away information. Our team carefully cleans and reconciles your data to over 99.9% accuracy, maximizing reliability across your internal systems and within financial reports.



CHOOSE AMONG THESE CONVENIENT DELIVERY OPTIONS

Investigo Data Model

Tap into actionable data at the enterprise level with a completely replicated database, using an SQL server and sync program.

APIs

Use web server-driven 'calls' to our data warehouse to return information in an on-demand structure.

Advisor Dashboard

Enjoy flexible display and presentation options that put real-time reporting and intelligence at your fingertips.

Client Portal

Provide clients seamless access to portfolio insights and account details via an easy-to-use web portal.



DO MORE: Quality data is actionable data.

GAIN ENTERPRISE-WIDE CONFIDENCE

From client-facing advisors to back-office personnel, now everyone can access positions, transactions, performance and more—all from a single, golden source of data.

- Perform deep analytics with interactive worksheets, data visualization tools and historical account views.
- Easily segment analyses by product, company, advisor, client, contributions, withdrawals, security type, account type and more.

ACCELERATE TIME TO VALUE

Our open architecture and flexible platform seamlessly plugs into your existing business ecosystem, so you can deploy faster and add new users with ease.

- Integrate with existing CRM, financial planning and portfolio management solutions.
- Leverage a highly scalable back-end architecture for sustained growth and performance.

UNLOCK ADVISOR PRODUCTIVITY

Attract and retain top advisors by providing the technologies they need to work faster and smarter.

- Give advisors a complete view of their entire book of business.
- Easily segment clients, identify cross-sell opportunities, conduct performance reporting and benchmark analyses.

ELEVATE THE CUSTOMER EXPERIENCE

Give clients the best advice and service at every touch point.

- Create client reports in minutes when you gain fully transparent insight into all client holdings, AUM and held-away data.
- Quickly detect portfolio changes that require communication with clients.



Tap into a
report library with

70+ reporting
configurations

Give clients

24/7 access
to data



GO BEYOND ACCURATE: DATA AGGREGATION POWERS THESE BROADRIDGE SOLUTIONS

Advisor Compensation

Enable advisors to view and extract critical information via a centralized dashboard for sales, commissions, news, alerts and earnings.

Compliance

Easily monitor account and transaction details at the branch or advisor level.

Automated Revenue and Expense Management

Improve the quality of your fee tracking, calculation and invoicing processes with our flexible, rules-based solution.

Intelligent Analytics

Easily analyze your data across platforms, programs and silos, so you can quickly discover what's working, what's not—and why.

EXPECT MORE: Confidence is built on concrete results.

TURN TO AN EXPERIENCED FINTECH WITH A 20-YEAR HISTORY OF INDUSTRY-LEADING INNOVATION

- 4,500+ direct interfaces
- 15,000+ indirect institutions
- 60+ clients representing 50,000+ agents and advisors
- Built on the pioneering technology of Investigo

RELY ON DEEP, UNMATCHED INSURANCE EXPERTISE

Our solutions aggregate 22 million insurance policies and contracts every day for over 35,000 agents in the field.

- Leverage comprehensive information about policy holders and policy details, which are aggregated and displayed through purpose-built formats.
- Tap into a vast library of insurance-specific reports.
- We work side by side with you, intimately involved with DTCC and ACORD working groups to promote industry best practices.

TRUST YOUR REPUTATION TO NOTHING LESS THAN OURS

Our data security infrastructure is built on geographically-dispersed Tier III (or greater) data centers, offering world-class physical protection.

- Employ SSAE 18 SOC 1 Type II
- Health Insurance Portability and Accountability Act (HIPAA) BAA
- ISO 27001 certified since 2009

Ready to take the next step?

Contact your Broadridge representative or
call +1 (855) 252-3822 today.

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.

broadridge.com



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Only Broadridge covers every dimension of true data aggregation.



The most complete view



Direct data feeds from custodians



The highest quality data



Enterprise-wide integration



Intuitive, accessible user experience



Accurate, reliable reporting

Ready for Next

Communications
Technology
Data and Analytics

