



DATA AGGREGATION, REPORTING AND ANALYTICS TOOL

Data you can trust. Tools you need.

THE SMART CHOICE FOR DATA AGGREGATION AND ANALYSIS

Gain an accurate, holistic view of client assets

Increase assets under management

Improve performance

Enhance client service

Expand your practice

Grow your profits

“The Broadridge Data Aggregation, Reporting and Analytics Tool saves me at least 45 minutes per client review, which allows me to meet with ten more clients a week.”

The Broadridge Data Aggregation, Reporting and Analytics Tool uniquely offers you the ability to view all client holdings at the touch of a button, helping you work more efficiently, make better-informed recommendations and grow your practice.

More efficient practice management

Automatic data collection frees advisors from time-consuming administrative tasks and eliminates errors due to manual data entry. Robust functionality includes built-in practice management tools and seamless integration with external platforms and applications. Intuitive dashboards and portfolio management tools facilitate analysis, improve performance and help identify opportunities for growth.

A better experience

Broadridge combines rich client profiles, detailed portfolio analysis, powerful reporting capabilities and valuable insights to deliver better results for clients and drive greater profits to your bottom line.

Insurance-specific insights

Because we understand the difference between an insurance client and an investment client, Broadridge supports advisors with extensive insurance product knowledge, in-depth details on custom screens and a vast library of insurance-specific reports. With comprehensive information about the policyholder and policy details, you can answer client questions with just one call instead of three.

Powerful, insightful and easy to use

See more, with less effort.

Benefit from a truly comprehensive view of all client assets, including brokerage accounts; direct business; insurance products (variable, fixed, equity-indexed, life and annuities); retirement accounts (401(k) and IRA); and held-away business.

Count on accurate, actionable data.

Because we understand that your reputation rests on the accuracy of your data, we accept no compromises when it comes to data quality. Our rigorous process uses defined business rules based on industry best practices to achieve 99.9% accuracy.

Our proven, three-step aggregation process

Broadridge delivers accurate, comprehensive and reliable client data through an efficient, automated process that identifies and quarantines bad data before it can get into your database.

- 1. Consolidation:** Client data is automatically collected from thousands of online sources to deliver a comprehensive view of all assets. Daily updates ensure that you are always working with the most recent, accurate information available.
- 2. Scrubbing and reconciliation:** Data is cleansed, formatted and reconciled in accordance with industry best practices. Highly skilled, experienced data stewards ensure consistent data governance standards.
- 3. Delivery to the desktop:** Broadridge feeds the validated data into client profiles for presentation via easy-to-use dashboards.

Plan proactively.

With all assets on a single platform and daily updates, you can monitor client portfolios more closely and improve performance by providing better, timelier recommendations.

- Profit from integrated practice management tools.
- Structure client portfolios and households with ease.
- Save time with easy-to-use dashboards and report templates.
- Export data to a broad range of advisor tools.

REAL WORLD RESULTS

Advisors using the Broadridge Data Aggregation, Reporting and Analytics Tool have achieved:

- 11% growth in client base
- 12.5% increase in assets under management



Learn more

Discover how Broadridge can provide you with better data to enhance your practice and your client relationships. Call +1 800 237 1900 or learn more online at broadridge.com.