

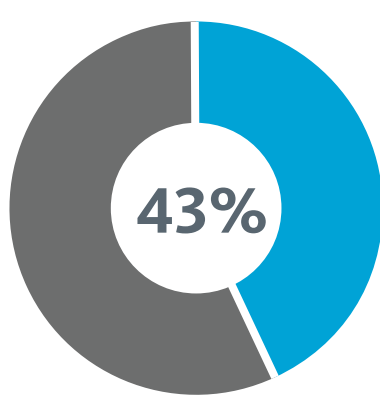
# Data Unleashed

## The Next-Gen Data-Enabled Advisor

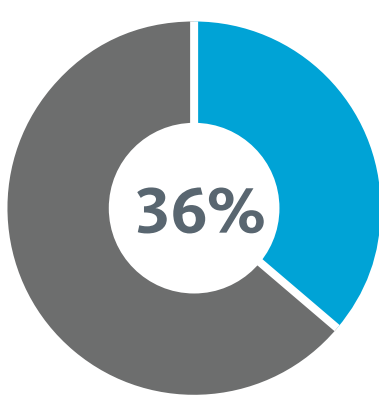
Client expectations are changing. Today's investors demand personalized service, more options and holistic financial advice.

**Not every advisor is ready.**

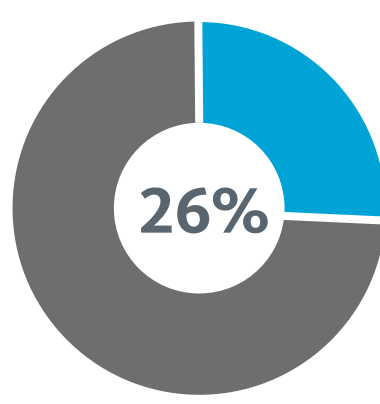
### ADVISOR PREPAREDNESS



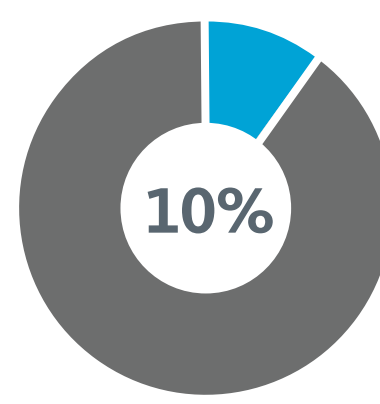
Not ready to provide holistic goal-planning advice



Not prepared to offer alternative investment opportunities



Effectively use data and analytics to understand clients



Leverage artificial intelligence to deliver client service

Source: Broadridge Financial Solutions and ESI ThoughtLab 2018 Advisor Survey

**You can deliver the tools advisors need to exceed client expectations. Unleash the next-gen advisor with these data-centric advisor solutions.**

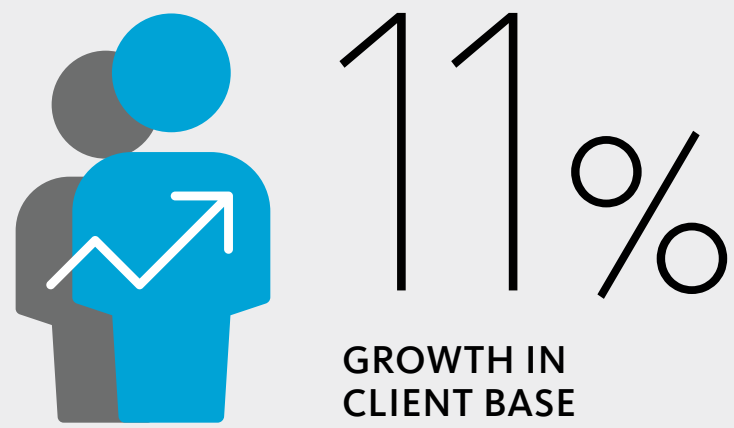


## 1 | Data Aggregation

Make sure your advisors see the whole picture.

Advisors can't work without reliable data. Provide a consolidated view into each client's holdings—regardless of custodian—with Broadridge's [Data Aggregation, Reporting and Analytics Tool](#).

### SEE REAL-WORLD RESULTS



Source: Broadridge Financial Solutions



## 2 | Data access

Empower advisors with smarter productivity.

Inaccessible data is useless data. That's why Broadridge created [Advisor Desktop Solutions](#), a centralized, integrated platform for sales data, commissions, news, alerts, earnings and more.

### UNLOCK ADVISOR PRODUCTIVITY



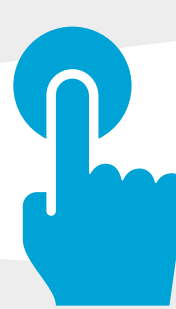
Client Origination



Investor Engagement



Advisor Business Management



Account Management



Planning and Investing



## 3 | Data insight

It's never been easier to win new business.

Successful advisors rely on actionable data. [Broadridge Smart Insights™](#) uses machine learning and artificial intelligence to help advisors identify prospects and deliver more relevant content — automatically.

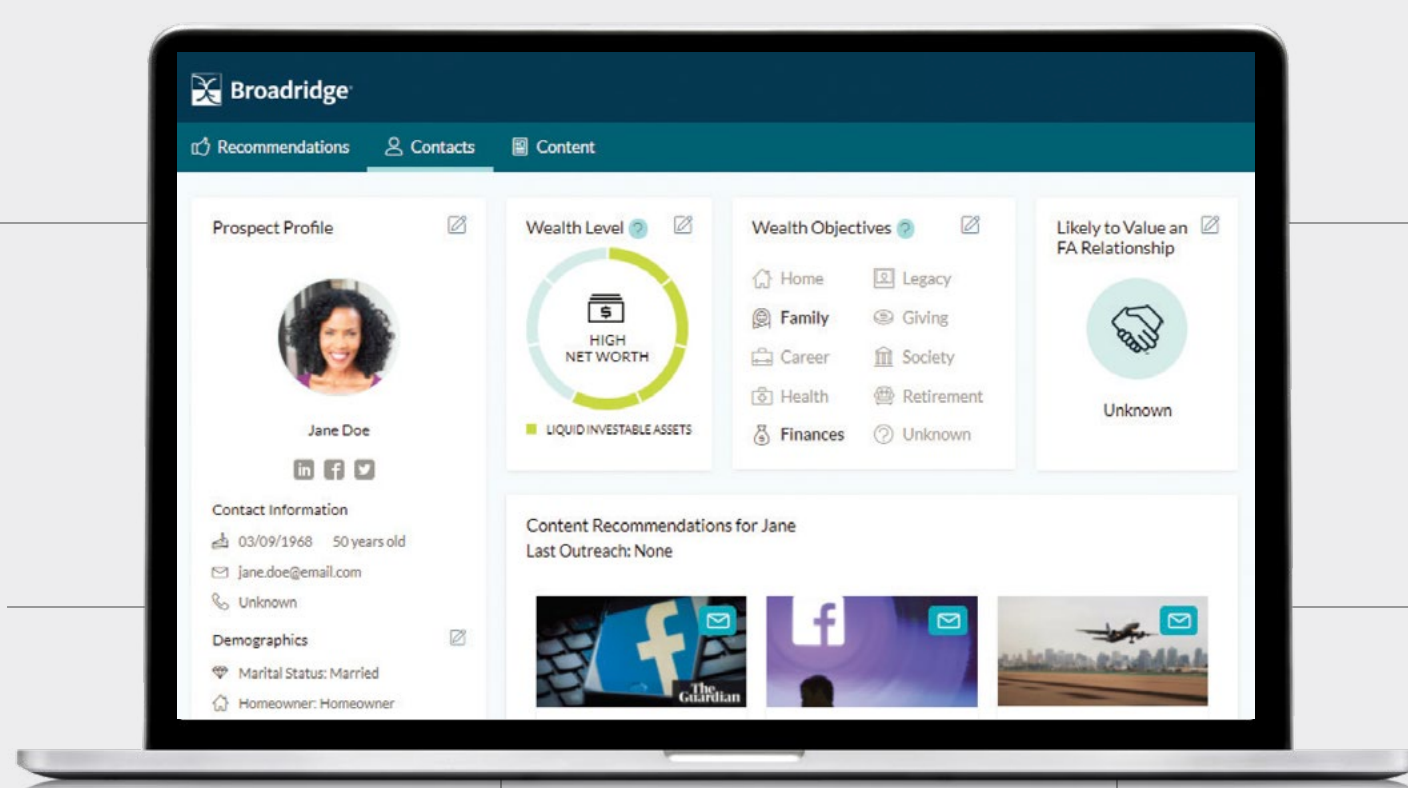
### DRIVE PERSONAL CONNECTIONS



Detailed Prospect Profiles



Artificial Intelligence



Content Recommendations



Multi-Channel Publishing



Prospect Fit Analysis



Automated Prospect Management

## Ready to take the next step?

Contact your Broadridge representative today: 855-252-3822

Broadridge, a global fintech leader with \$4 billion in revenue, provides communications, technology, data and analytics solutions. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth.