

# Opportunity Hunter – Retirement

The Mobile, Data-Driven Business Intelligence, Prospecting and Sales Tool

Deep intelligence for all segments of the \$10 trillion private sector retirement market, including DCIO, advisor-sold, mid-market intermediaries, investment consultants and recordkeepers.

## Identify your next best opportunity

Finding the right opportunities is critical for your organization. With hundreds of thousands of advisors and thousands of firms, identifying which offer the best retirement sales potential can be time-consuming.

Opportunity Hunter provides the insights you need to target your best prospects quickly and easily. This unique analytics tool arms your team with valuable information to progress quickly and effectively through the sales process.

*“OH helped us quickly narrow our universe of prospects and reduce the number of sales meetings required to close the deal by 25%.”*

*– Head of RIA sales for NY-based mutual fund company*

Accessible anytime and anywhere, Opportunity Hunter combines market data from 20+ of the nation’s leading advisor-sold recordkeepers, investment and service provider data from Form 5500 filings, and Morningstar to identify and calculate sales opportunities.

Drill down to plan and retirement advisor profiles, asset totals, asset types and individual funds, and see exactly where your funds outperform current investments. Your team can have more-informed conversations that help them stand out from the competition by accessing real insight.

*Gain instant intelligence on your best prospects: where to find them, whom they serve, what they sell and where your funds outperform.*



## Find prospects, win their business

### Target top prospects

Prioritize retirement advisor and consultant opportunities based on actual plan holdings for the over \$10 trillion private sector retirement market, including mutual funds, CITs, Pooled Separate accounts and ETFs.

### Go where you can win

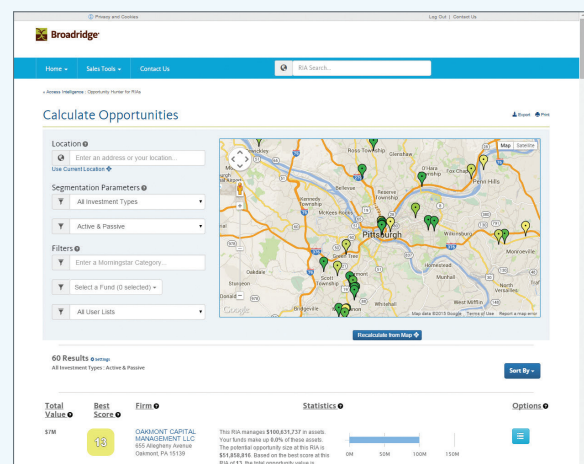
Compare your funds with the actual retirement plan investments managed by each advisor or consultant.

### Know your advantage

Identify specific retirement plans where your products outperform the competition, and target advisors or consultants for those retirement plans.

### Have informed conversations

Prepare yourself to respond to questions about your funds and gain deep prospect insight.



Retirement advisors are scored by potential, so you can identify top prospects for any geography.

## Achieve better results in less time

Opportunity Hunter consolidates, scores and analyzes data from multiple sources, presenting these insights in a simple, mobile-enabled user interface. Now sales teams can spend less time researching prospects, confident that they have the insights they need for every opportunity.

- Improved prospecting
- Enhanced insight
- Greater efficiency

## Know your prospects

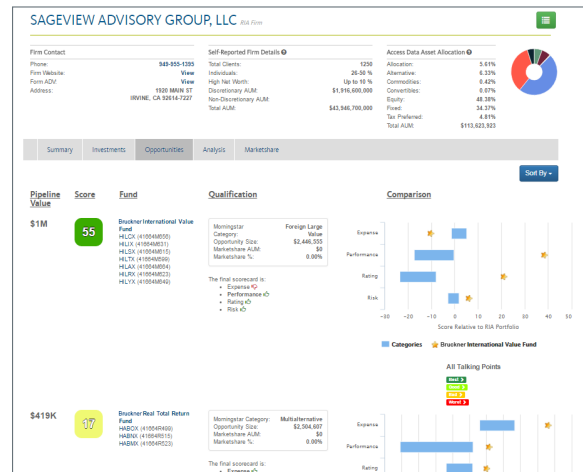


View in-depth profiles of tens of thousands of retirement advisors and consultants, including up-to-the-month investment data by Morningstar Category, Active vs. Passive funds, and Investment Vehicle Type.

**Don't miss a single opportunity**

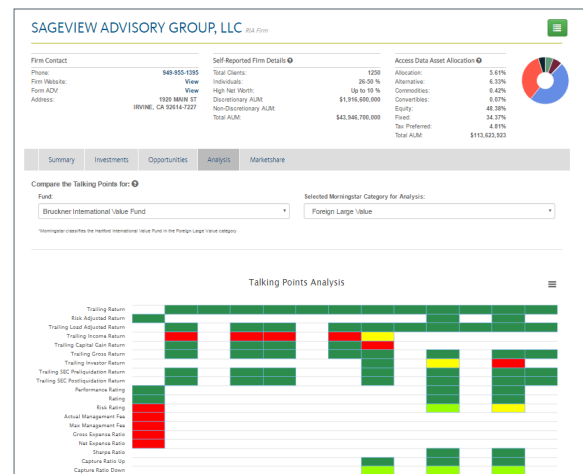
Schedule a demo or request a complimentary analysis of your fund's opportunities today. Call Fred Kosanovic at +1 412 201 6084 or email [fred.kosanovic@broadridge.com](mailto:fred.kosanovic@broadridge.com).

## Pinpoint opportunity



Opportunity Hunter calculates the sales potential with each retirement advisor or consultant, based on the total assets, plans and recordkeepers used by that prospect. The analysis compares your funds against actual fund investments held using almost 200 data points provided by Morningstar including performance, rating, expense and risk attributes.

## Win more business



Focus on the key advantages of your funds. The simple, easy-to-view intelligence shows how your funds compare with the funds currently utilized by each prospect. Color-coded charts highlight the most relevant data including performance indicators, expense ratios, existing portfolio holdings and opportunity size.

