ASSET MANAGEMENT SOLUTIONS

Broadridge®

Opportunity Hunter – Retirement

The mobile, data-driven business intelligence, prospecting and sales tool

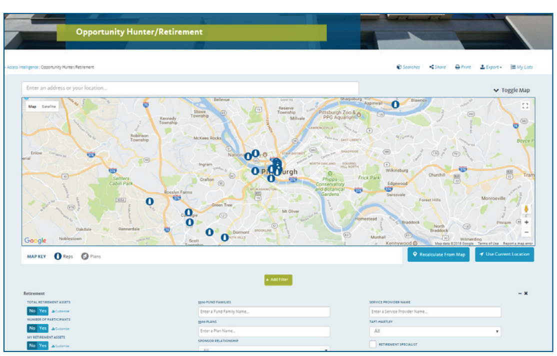
FIND PROSPECTS, WIN THEIR BUSINESS

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.

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%."
>
> – NY based Asset Management firm

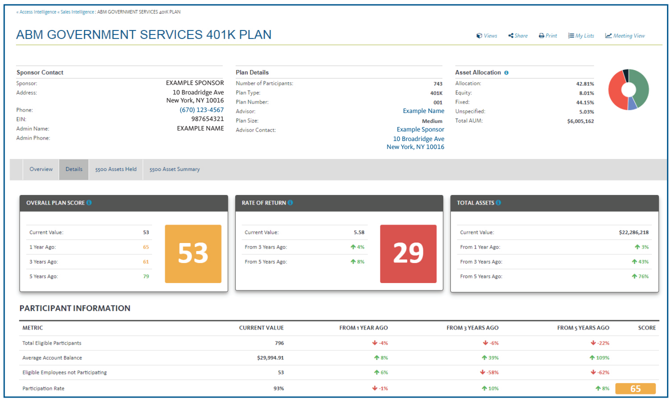
ACHIEVE BETTER RESULTS IN LESS TIME

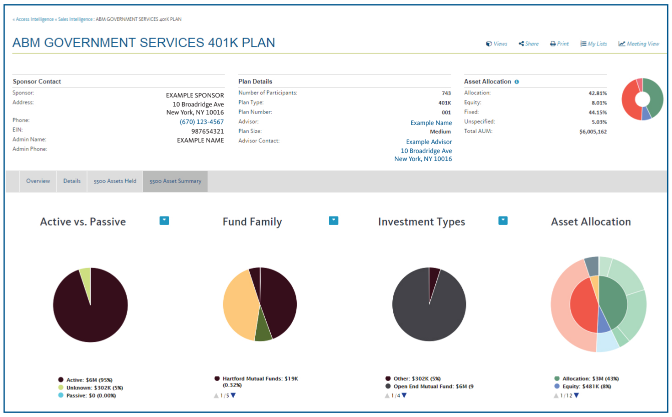
Opportunity Hunter consolidates, scores and analyzes data from multiple sources, presenting these insights in a simple, mobileenabled user interface. Now sales teams can spend less time researching prospects, confident that they have the insights they need for every opportunity.

- Improved prospecting
- Enhanced insight
- Greater efficiency

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

KNOW YOUR PROSPECTS

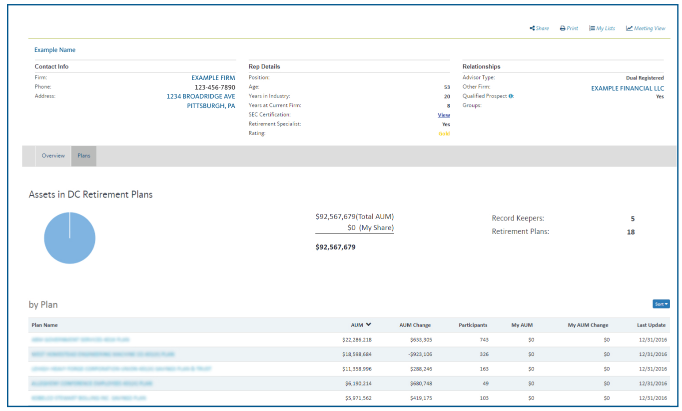




View in-depth profiles of tens of thousands of retirement advisors and consultants, including up-to-the-month investment data by Morningstar Category, Active vs. Passive funds, and Investment Vehicle Type.

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.

WIN MORE BUSINESS



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.

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.

broadridge.com

Ready for Next

Communications
Technology
Data and Analytics

AM_00024_SS_18