

Optimize share recall

Broadridge® Share Management Solution

TAP INTO POWERFUL PROPRIETARY DATA

- Execute an efficient recall process.
- Easily identify specific meetings.
- Eliminate guesswork and minimize risk.
- Maximize interest revenue.
- Customize reports to your unique needs.
- Get a consolidated view of all global and U.S. upcoming meetings.

MANAGE SHARE RECALL WITH CONFIDENCE

Custodial firms continue to expand stock lending programs. But with more clients and unique contracts, it's harder than ever to track annual meetings and recall shares for voting. Often, stock lending management teams rely on guesswork or blanket recall, which invites risk and causes some to lose out on valuable interest revenue.

Now you can optimize your share recall process with the Broadridge Share Management Solution. Get consolidated reports that include both global and US-based upcoming meetings. Because we manage proxies for thousands of public companies every year, we can provide exclusive advance notice of record dates—usually prior to meeting announcements. Plus, we'll help you stay proactive, using historical data from our Proxy Policies and Insights application to more accurately predict global meeting dates.

CUSTOMIZE REPORTS TO YOUR LENDING PROGRAM REQUIREMENTS

Gain the intelligence you need to make informed decisions about shares out on loan. Our solution enables you to identify upcoming meetings of interest based on keywords, materiality scores and other meeting aspects relevant to client needs. Then, schedule regular reports and data feeds based on your specific criteria. For example, choose to view only meetings with contentious proposals or ESG-related matters. A team of dedicated professionals will help you filter meetings to ensure you can execute your recall process in a timely and efficient manner.

ONLY BROADRIDGE DELIVERS COMPREHENSIVE MEETING DATA, CUSTOMIZED TO YOUR UNIQUE BUSINESS NEEDS

AGGREGATED MEETING DATA SOURCES

Global & U.S. historical meetings data
2B+ annual shareholder communications
66K annual EDGAR filings
Public Data



CUSTOMIZABLE
FILTER CRITERIA

DELIVERY AND REPORTING OPTIONS

FTP | Email | ProxyEdge Platform

For a detailed demonstration or more information, please contact us at +1 855 252 3822, or visit our website at broadridge.com.

Communications
Technology
Data and Analytics



broadridge.com

Ready for Next