


Win new business with speed and precision.

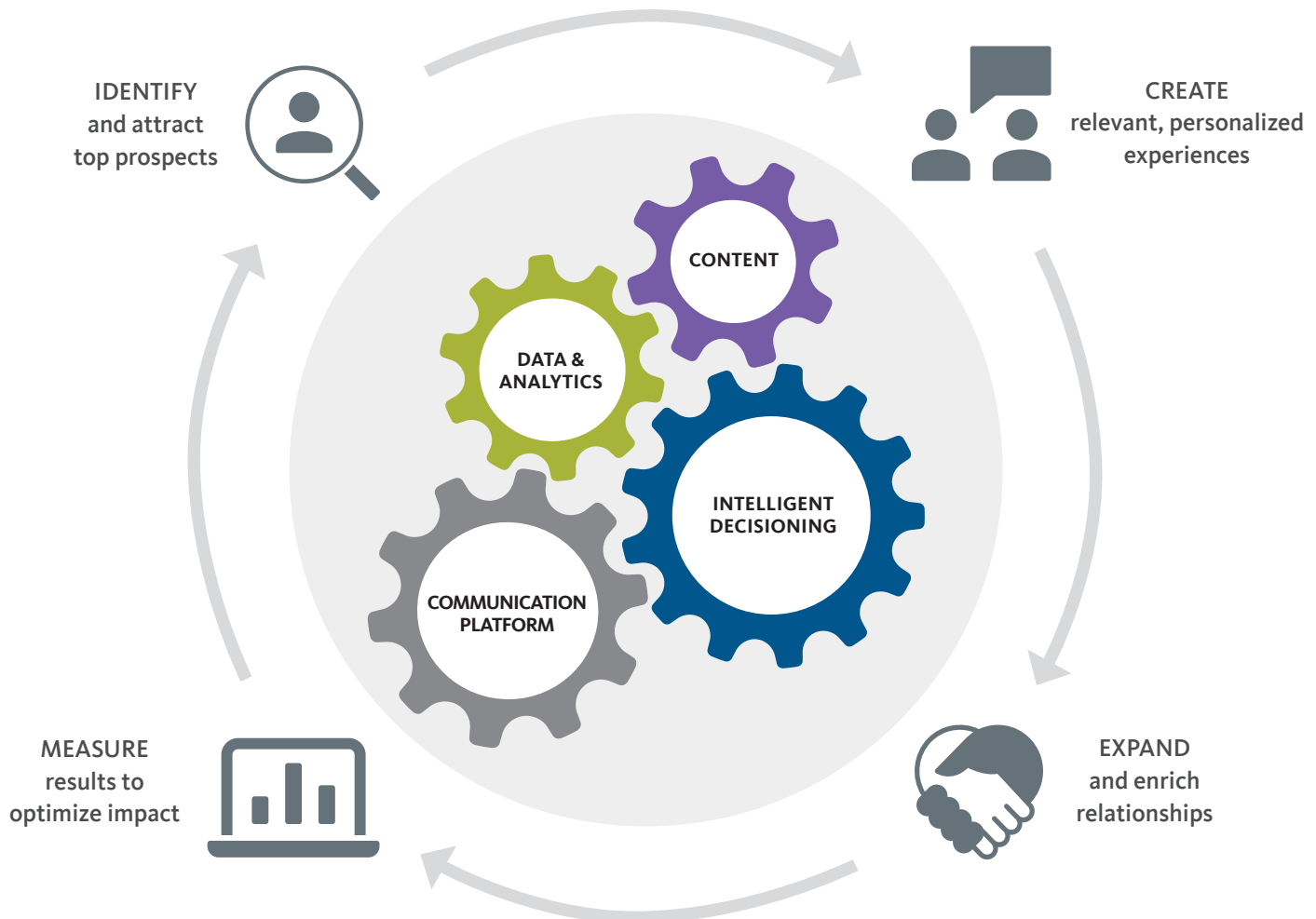
Next-generation marketing technology designed
to support advisors and supercharge growth.



Your team works hard to attract the right prospects, establish trust and demonstrate value. Now, there's a better way to drive your sales and marketing. See what happens when targeted content, artificial intelligence and data analytics work together on your behalf.

One platform. Endless opportunity.

Intense competition, savvy investors and information overload make it hard to stand out. Broadridge understands. That's why we developed a comprehensive suite of solutions designed to systematically propel the entire marketing ecosystem.



When you understand your clients, you can meet them on their terms—and exceed expectations at every step.

Transform the entire marketing ecosystem.

Whether you need to tackle highly-specific challenges or build an entirely new marketing infrastructure, Broadridge offers flexible implementation options to help you achieve your goals.



BETTER DATA. DEEPER INSIGHT.

Take advantage of the industry's largest organic marketing database with access to detailed consumer profiles, shareholder data and more. Fully integrated data aggregation, normalization and validation processes deliver enhanced transparency and a consolidated 360-degree view of each client account. Then, machine learning enables advanced analytics with segmentation, modeling and reporting.



START A CONVERSATION. MAKE AN IMPACT.

Deliver relevant, useful content to inform and empower your clients. A huge library of custom content makes it easy to share calculators, market summaries, newsletters and seminars. Tap into more than 3,000 FINRA-reviewed resources, including 2,300 articles organized by 17 life events and 10 financial goals. All content is continuously updated to reflect industry trends and best practices.



SHARPEN PROSPECTING. OPTIMIZE CONVERSIONS.

Unlock the power of artificial intelligence to make smarter decisions, forge stronger connections and enrich existing relationships. Prospect-fit tools help hone your acquisition strategy, so you can boost ROI. An innovative recommendations engine chooses the most relevant content, automatically. Then, algorithm-based distribution engages prospects and clients at just the right cadence.



SYSTEMATIZE ENGAGEMENT. AUTOMATE SUCCESS.

Our integrated, user-friendly platform enables end-to-end campaign management — all in one place. Now, you can connect with clients on any device when they want, via the channels they prefer: web, social, email, mobile and print. Plus, response capture, automated feedback and traffic analytics lets you make critical adjustments in real time.

Empower the next-gen advisor.

Recruit and retain top advisor talent with powerful technologies that help advisors work smarter and modernize their practice.

DATA AND ANALYTICS

Wealth Insights Services
Performance Analytics
Database Services
Marketing Database
Data Aggregation and Financial Reporting
Client Information Management
Account Aggregation/Householding
Proxy Shareholder Data
Regulatory and Compliance Data
CRM Data Integrations

CONTENT

2,300 FINRA-approved Articles
Advisor Resource Center
eCards
Market Summaries
Industry Trends
Seminars
Newsletters
Continuing Education
200+ Interactive Calculators
300+ Presentations

INTELLIGENT DECISIONING

Broadridge Smart Insights Intelligent Prospecting
Artificial Intelligence and Machine Learning
Segmentation
Advanced Analytics and Reporting
Systematic Prospecting
Modeling
Google Analytics
Next-Best Action Recommendations
Trigger Alerts

COMMUNICATION PLATFORM

End-to-end Campaign and Lead Management
Custom Integrations
Advisor Website
Mobile App
Subscriptions
Professional Services
Sponsored Name Placement
Local Business Listings
Investor and Advisor Mailbox
Email and Direct Mail
Digital Delivery

READY TO TAKE THE NEXT STEP? Contact your Broadridge representative today: +1 855 252 3822.

Broadridge, a global fintech leader with \$4 billion in annual revenue listed on the S&P 500 index, provides communications, technology, data and analytics. 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

