

Empower your enterprise with the only secure, complete, reconciled and normalized data management solution

Data powers your business. Broadridge Data Aggregation converts massive sets of disparate data into actionable insights.

Accelerate data management—from front to back office—with a single solution that delivers a holistic view of all client assets and liabilities. Broadridge Data Aggregation and Financial Reporting enables you to manage client portfolios and generate reports with ease. Accuracy is imperative. Only Broadridge has the data governance experience to offer you a true competitive advantage.

INCREASE PRODUCTIVITY, GROWTH AND SECURITY

Gain a deeper understanding of the regulatory, privacy and fiduciary trends impacting your business. Broadridge Data Aggregation and Financial Reporting consistently provides timely and reconciled data, enabling you to focus on higher-level business opportunities. Our solution delivers a 360-degree view of all customer assets and liabilities using direct feeds from custodians and client-approved access to their data at other financial institutions.

Discover new opportunities. Easily identify your next best action with multi-functional views including assets under management, cash balances and new accounts.

Deepen client relationships. Leverage enterprise-centric and client-authorized data aggregation for client assets and liabilities. Get performance reports and easily feed data to third-party applications.

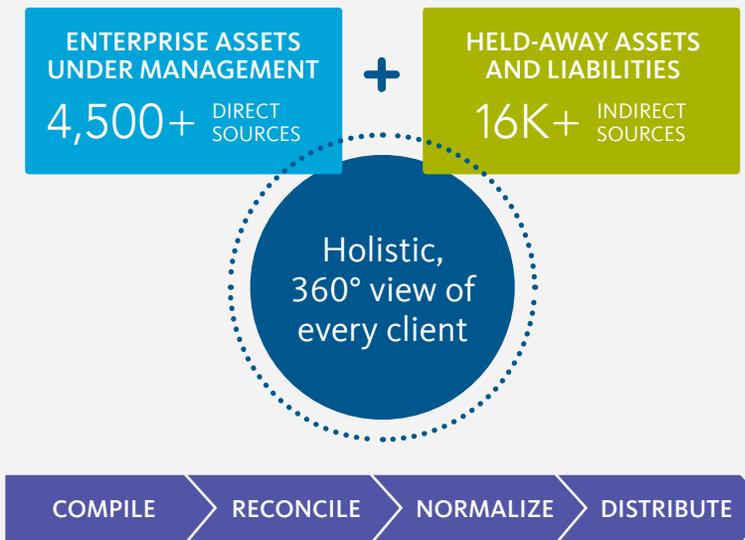
Supervise your advisors more effectively. Streamline report generation across client groups or at any level in the advisor-firm hierarchy.

Ensure data security. Confidently maintain data quality and security standards with the only solution that delivers reconciled data every day.

Enterprise-wide data management. Redefined.

Aggregate data across all investment and banking account types and products including:

Deposit and Investment Accounts | Loans and other Liabilities
Insurance and Annuity Products



Quality data provides smarter insights

Comprehensive financial advice begins with a holistic view of every client’s assets and liabilities. Empower your advisors with the actionable information required to deliver more value—at every point of interaction. Confidently evolve your performance capabilities with a single, complete data management solution to accelerate growth across your enterprise.

Generate reports across client groups or at any level you require.

Access an extensive library of investment- and insurance-specific reports to acquire insights to help grow your business.

Track performance and identify opportunities for growth.

Equip your team with practice-management tools that maximize productivity.

Facilitate comprehensive analysis with intuitive dashboards.

Leverage expertise and insights gained by processing tens of millions of investment and insurance transactions every day for over two decades.



Fully Reconciled Data



Direct Custodial Feeds



Centralized Data Repository



Robust APIs



Client Assets and Liabilities



360° Client View Including Held-away Assets and Liabilities

“Spend less time managing data and more time turning data into insights that drive business growth.”

– GAIL DOOLIN, VP STRATEGIC SOLUTIONS, BROADRIDGE

Empower your advisors to deliver more value with Data Aggregation and Financial Reporting from Broadridge.

Learn more at broadridge.com/dataaggregation

