Digital transformation in wealth management: real examples, real impact

Digital transformation is accelerating across wealth management. These four examples show how firms are modernizing infrastructure, unifying data, and digitizing operations to unlock scale, efficiency, and growth.

Turning digital engagement into growth

For Mandeville Private Client, advisor growth depended on stronger digital engagement, but tools were inconsistent, adoption uneven, and impact was difficult to measure.

Using Broadridge's AdvisorStream capabilities, the firm centralized compliant content and social engagement:

- **80% advisor adoption**
- **75% increase in social media generated leads**
- **100% higher click-through rates than the industry average**

Digital engagement became scalable growth.
See how Mandeville accelerated advisor growth.

Read the case study

When legacy operations cap growth

A Tier 1 wealth manager knew its manual, fragmented workflows wouldn't support future growth or rising expectations. Optimizing at margins wasn't enough.

Through Broadridge BPO, the firm reengineered operations, end-to-end:

- **150% increase in processing capacity**
- **30% lift in advisor and client satisfaction**
- **Digitized, scalable workflows**

Operations became a growth engine, not a constraint.
Discover how they transformed operations.

Read the case study

When 15 corporate actions systems became one

A Tier 1 U.S. bank was running corporate actions across 15 disconnected platforms, manual touchpoints, inconsistent data, and limited visibility. Scaling automation wasn't realistic.

With Broadridge Corporate Actions and Income Processing, the bank unified those systems into a single global platform:

- **100% elimination of manual steps**
- **One standardized data model**
- **Real-time global processing**

An architectural reset reduced risk and unlocked scale.
See how they made the shift.

Read the case study

Creating the golden record for 12,000 advisors

A leading advisor network faced fragmented data across custodians and platforms, with no single source of truth or consistent client view, and a limited ability to scale analytics or personalization.

Using Broadridge Wealth Aggregation & Insights, the firm built a real-time, enterprise-wide golden record:

- **Standardized account-level data**
- **Centralized reporting and oversight**
- **A scalable foundation for analytics and personalization**

They fixed the data first. See how.

Read the case study

New data from 2026 Digital Transformation & Next-Gen Technology Study shows how wealth firms are accelerating investment in AI, tokenization, and next-generation platforms.

The forces accelerating digital transformation

Source: Broadridge 2026 Digital Transformation & Next-Gen Technology Study

AI moves from pilots to production

2025 → 2026

31% → 80%

GenAI adoptioan in one year

GenAI has gone mainstream—fast

26% using agentic AI

More than half of adopters are already in production

Returns are materializing

72%

making moderate to large investments in GenAI

More than a quarter of firms already seeing financial benefits

54%

making moderate to large investments in tokenization

Tokenization has moved from talk to investment

Tokenization approaches an inflection point

2025 → 2026

42% → 55%

say blockchain unlocks new growth

Confidence in tokenization's impact is accelerating

72% agree tokenization enables new business models and products

Rapid shift from innovation to strategy

The non-negotiables for innovation

85% of wealth firms emphasize the importance of integrated platforms

Execution, not strategy, is the bottleneck

41% believe they'll need a new tech stack

Required to thrive in the age of AI

Discover how Broadridge powers digital transformation in wealth management

Broadridge®