Millennials are ready for you. Broadridge gets you ready for them.

An untapped market presents unprecedented opportunity.

24+ M
MILLENIALS DO NOT HAVE A RETIREMENT SAVINGS PLAN

70%
LACK A FORMAL RELATIONSHIP WITH A FINANCIAL ADVISOR

$30 T
WILL BE INHERITED BY MILLENNIALS IN THE NEXT FEW DECADES

The Research
Broadridge recently commissioned a major study to measure investor perceptions and attitudes related to wealth management and retirement. In partnership with The Center for Generational Kinetics (CGK), our team surveyed 1,003 U.S. respondents, aged 22 to 59. We asked questions designed to reveal how investors save for retirement and how expectations shape behavior.

Meet millennials where they are, on their terms.

RESEARCH ANALYSIS
In-person interactions build the most trust with a new financial advisor.

70% OF MILLENNIALS PREFER MONTHLY — OR MORE FREQUENT — COMMUNICATION

50% SAY EMAIL IS THE PREFERRED METHOD OF COMMUNICATION

73% 78%
In-person  Phone
84% Call

45% 56%
Email  Text
42% 32%
52% 2%

Ongoing, regular communication solidifies long-term trust.

30% VALUE REGULAR ALERTS TO HELP THEM SAVE MORE

35% VALUE SOCIAL MEDIA OUTREACH

Take Advantage of Automated Social Media and Email Marketing
Create customized emails with relevant content using our intuitive, automated platform. Send greeting cards for birthdays, anniversaries, holidays and more. Engage across all major social media sites to stay in front of clients and strengthen relationships with prospects.

- Integrated compliance review
- Content updated regularly
- Tracking and reporting tools
- Helpdesk support

Experience matters. Make yours visible.

RESEARCH ANALYSIS
55%
SAY EXPERIENCE IS THE #1 QUALITY THEY VALUE MOST IN A FINANCIAL ADVISOR

SOLIDIFY YOUR BRAND WITH ADVISOR WEBSITES THAT CONVEY PROFESSIONALISM AND EXPERIENCE
Set up your website in minutes using our innovative templates. Customize your pages and content to reflect your personal brand, adding videos, calculators, newsletter articles, calendars and more.

- Enjoy white-glove setup service
- Configure to customized specs
- Include engaging content
- Make it mobile-friendly

Research Analysis
55%
MILLENNIALS
45%
GENERATION X
35%
BABY BOOMERS

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ARE MORE CONFIDENT INVESTING IN A SAVINGS ACCOUNT THAN OTHER INVESTMENT CHOICES

66% are confident investing in a savings account than other investment choices.

58% are confident investing in a private business.

ARE THE ONLY GENERATION THAT LOOKS FOR SAVINGS ADVICE MORE FROM FAMILY AND FRIENDS THAN FINANCIAL ADVISORS.

ARE THE ONLY GENERATION THAT LOOKS FOR SAVINGS ADVICE MORE FROM FAMILY AND FRIENDS THAN FINANCIAL ADVISORS.

Research Analysis

Our research indicates a serious education gap for younger investors.

55% of millennials say they would consider their family’s financial advisor

80% have never met their family’s financial advisor

Change perceptions. Make connections.

Provide meaningful insight and guidance.

LEVERAGE EXISTING RELATIONSHIPS

BROADREFERRAL NETWORKS USING TURNKEY SEMINARS

Our robust library of thoughtful, FINRA-reviewed presentations includes seminars on a range of topics to help you deliver more value to your prospects and clients.

- Topical and relevant
- Dining events
- One-on-one
- Multi-session
- Customizable for any audience

Research Analysis

Millennials are the only generation that looks for savings advice more from family and friends than financial advisors.

Research Analysis

Our research indicates a serious education gap for younger investors.

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Become a true thought leader with our extensive library of original content. Easily share articles, videos, market summaries and e-seminar presentations that empower your clients with the information they need to make the best decisions.

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- FINRA compliant
- Distribute across any device
- Multiple content formats

Broadridge delivers next-gen innovations to keep you ready for the next generation investor. Discover more ways to take advantage of unfolding opportunity.

Contact your Broadridge representative today: +1 (800) 233-2834

Ready for Next