



CASE STUDY: DIGITAL LEAD OPTIMIZER

Build Brand Awareness and Capture Leads with Innovative Technologies and Digital Marketing Experts

YOUR IDEAL PROSPECTS ARE ONLINE, BUT WILL THEY FIND YOU?

New client acquisition is one of the biggest challenges that financial professionals face. With the new normal of virtual practice management, relying on traditional marketing and advertising is no longer a viable growth strategy.

Consumers are turning to the Internet to seek out investment advice and can find more options than ever before. Staying ahead of digital marketing trends is challenging, especially when layering on the complication of compliance. How do professionals stand out from crowd through the continued expansion of Internet technologies and self-serve platforms?

DIGITAL LEAD OPTIMIZER DRIVES DEMAND TO YOU

Broadridge Advisor Solutions understands the challenge of today's digital world. That recognition led to the development of Digital Lead Optimizer, a next-gen marketing solution that simplifies the complex world of digital marketing. With this streamlined solution, financial professionals have access to an intuitive and targeted lead-generation process that is compliant, on-brand, scalable and effective.

CORE BENEFITS

- Attract clients who match your financial expertise
- Position yourself as the go-to financial expert
- Build meaningful connections and increase word-of-mouth influence
- Benefit from ongoing optimization of digital campaigns
- Grow your client base and increase your AUM

Get Started Today

Call +1 800 233 2834

Visit broadridge.com/advisor/digital-lead-optimizer

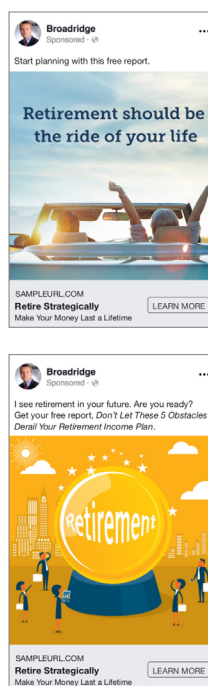
or email advisorsolutions@broadridge.com

The Easiest Way to Increase Brand Awareness, Web Traffic and Leads

With Digital Lead Optimizer, you can expect an impactful digital campaign that generates leads that you can add directly to your prospect list for immediate nurturing.

	CAMPAIGNS:			
	Retirement at Risk	Transition to Retirement	Countdown to Retirement	Rollovers
Ad Impressions	24, 154	9,451	10, 476	7, 187
Ad Clicks	189	217	239	108
Leads	19	13	18	12
Lead Range	16 to 63	9 to 51	15 to 48	13 to 39
Cost Per Lead	\$29	\$48	\$64	\$91
Cost Per Lead Range	\$16 - \$80	\$17 - \$81	\$13 - \$95	\$21 - \$118

Results are averages for campaigns running from January to March 2021.



AVAILABLE CAMPAIGNS

Select from a library of Broadridge campaigns that align with your practice and client engagement strategy, or ask about our custom campaign capabilities.

- Is Your Retirement at Risk?
- Countdown to Retirement
- Retirement Income
- Roth Conversion
- Business Succession
- Concentrated Stock Positions
- College Planning
- Environmentally Responsible Investing
- Exchange Traded Funds
- Exploring Alternative Investments
- Getting Started
- Issues Unique to Women
- IRA Rollovers
- Market Volatility
- Property & Casualty Insurance
- Life Insurance with Living Benefits

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