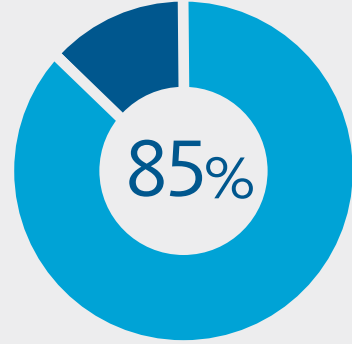


# Three strategies to optimize marketing operations and empower sales

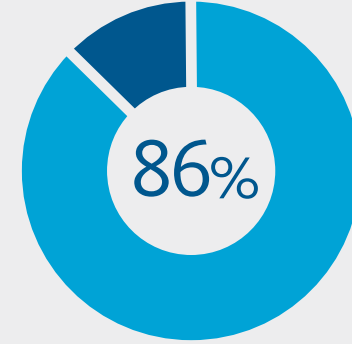
Competition is intense; it's not easy to break through the noise.



Percent of all assets owned by the 50 largest mutual fund firms.



Messages per week received by RIAs from asset managers.



Percent of asset managers who say their biggest challenge is getting in an RIA's door.

STRATEGY 1

Identify audiences most likely to distribute your products.



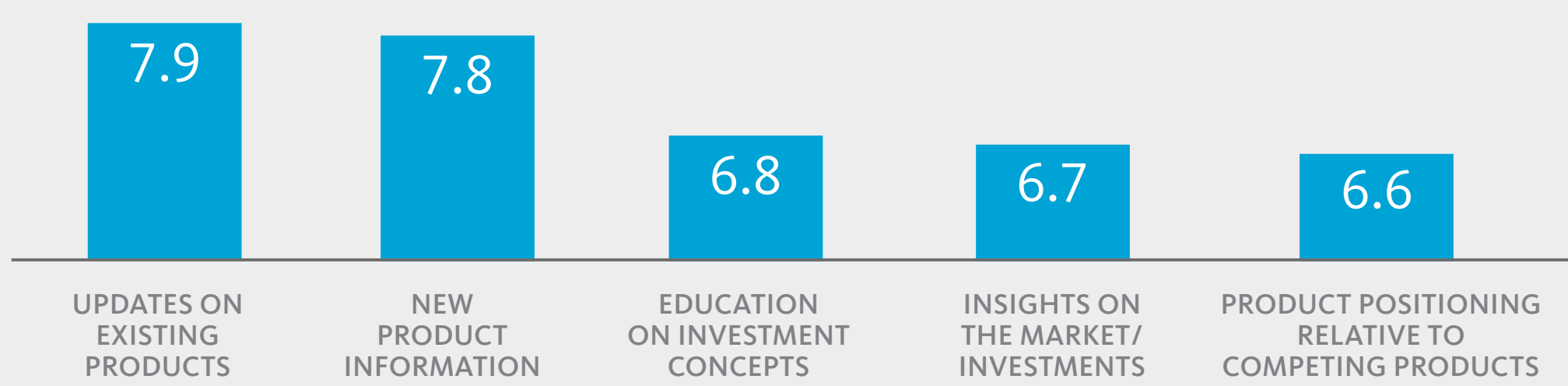
“A predictive analytics platform helped us quickly narrow our universe of prospects and **reduce the number of sales meetings required to close the deal by 25%.**”

—HEAD OF RIA SALES FOR NY-BASED MUTUAL FUND COMPANY

Advisors have rising expectations and diverse needs.

WHAT DO ADVISORS WANT FROM WHOLESALERS?

VALUE OF SERVICES PROVIDED RANKED OUT OF 10



Source: Wealth Management, The Next Gen Wholesaler, May 2017

STRATEGY 2

Strengthen relationships by delivering the value-added, informative content your partners need, when they need it.



“Market commentary is the most popular type of value-add resource that asset managers provide, cited as **very important or crucial by 42% of RIAs.**”

—IGNITES RESEARCH, THE NEW RIA OPPORTUNITY, JULY 2018

With so many martech choices in the market and so much money being spent on new technologies, it's more difficult than ever to effectively execute marketing strategies.

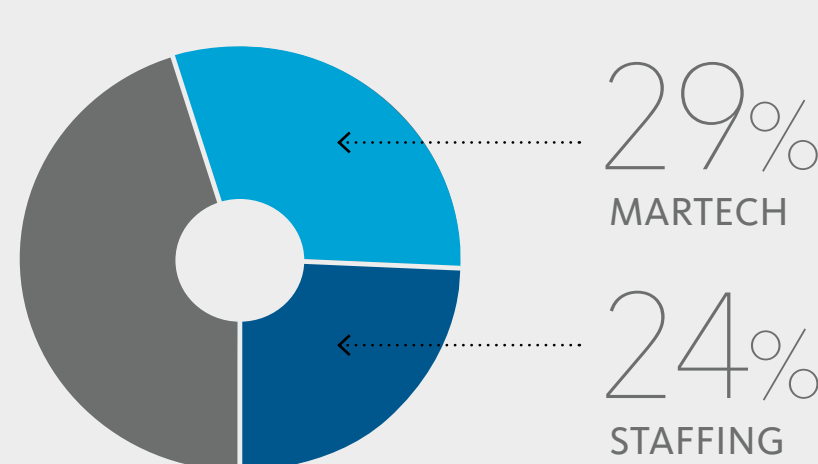
MARKETING TECHNOLOGY INDUSTRY<sup>1</sup>

NUMBER OF COMPANIES, 2011-2018



2018 MARKETING BUDGETS<sup>2</sup>

PERCENTAGE OF FUNDS SPENT



2018 marked the first time CMOs spent more on technology than on personnel. The Gartner survey cautions, “Ensure you have a martech roadmap for integrating applications, marketing and customer data to avoid costly mistakes.”

1. 'Martech 5000' Marketing Technology Landscape infographic 2. Gartner, CMO Spend Survey for 2018-2019

STRATEGY 3

Streamline and simplify your marketing operations by creating an integrated approach for managing and distributing content.

INTEGRATION INVOLVES BREAKING DOWN SILOES TO SYNCHRONIZE THESE ELEMENTS



CONTENT CREATION



CONTENT DISTRIBUTION



METRICS AND ANALYTICS

## Put the right message in the right hands at the right time.

Our comprehensive suite of solutions helps you identify, segment and reach advisors, so you can create deeper, lasting relationships.

Advisor Targeting

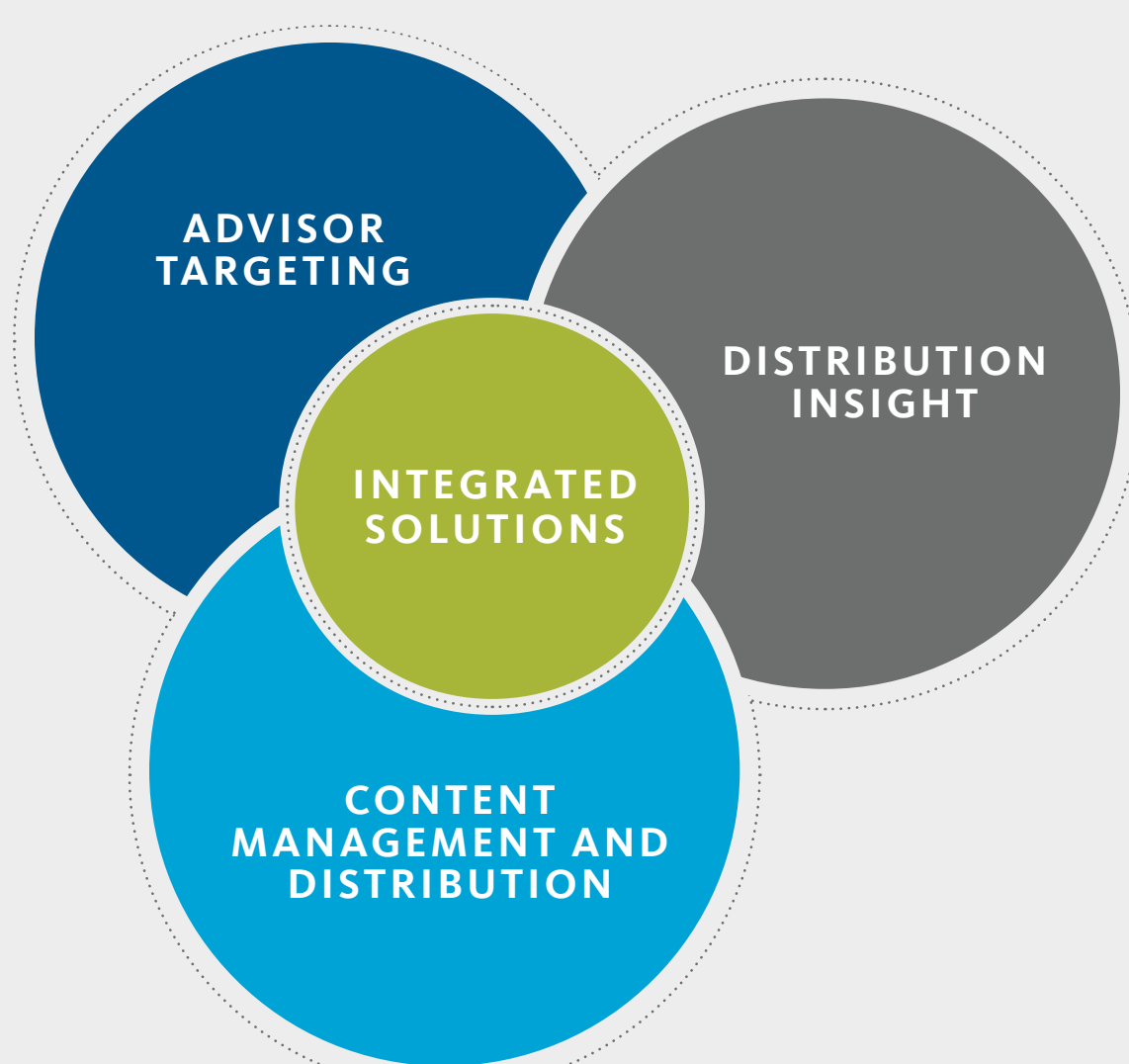
Opportunity Hunter enables asset managers to precisely target the RIAs, Banks, Broker-Dealers and retirement advisors most likely to sell their products.

Distribution Insight

Covering retail and institutional fund flows across every geography, Distribution Insight helps asset managers understand market share, product sales and where to locate the best opportunities.

Content Management and Distribution

ContentHub makes it easy to share sales and marketing content on demand, digitally or in print. All from one, secure location.



For more ways to transform your marketing approach, contact your Broadridge representative today at +1 866 359 0456.

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