

# Advisors Signal Desire for More Technology and Product Education to Drive Growth in New Study from Broadridge and FSI

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Investor interest in cryptocurrency increases despite limited advisor education, 51% of advisors already use generative AI, with client engagement and marketing as top benefits

NEW YORK, Feb. 2, 2026 /PRNewswire/ -- **Broadridge Financial Solutions, Inc.** (NYSE: BR), a global Fintech leader, and the **Financial Services Institute** (FSI), the leading advocacy organization for independent financial firms and independent financial advisors, today released a joint study, showing that advisors' growth ambitions are creating fresh demand for stronger technology and education support.

According to the survey, 68% of advisors are not very confident that their firm's current technology environment is optimized to support their growth goals, with 30% indicating that access to the right mix of tools would influence decisions about their broker-dealer relationships. At the same time, over three-quarters (76%) of advisors agree that better technology tools would greatly improve new client acquisition, signaling that there is meaningful upside for firms to continue investing in modern, advisor-friendly capabilities and the enablement needed to help advisors fully leverage them as their practices grow and scale.

"As client expectations rise, advisors are looking for more connected technology and stronger education to support growth," said Chris Perry, President of Broadridge. "Broadridge works closely with advisors and firms to help modernize technology environments, improve efficiency, and support more seamless client experiences, all of which help advisors streamline their practices, attract and retain next-gen clients, and expand their product offerings to include asset classes like digital assets."

The findings highlight a clear opportunity to further modernize and connect advisor technology, strengthen

education around emerging asset classes, and deliver intuitive tools that help advisors grow their businesses while building deeper relationships with next-generation investors.

## Platform priorities shape advisor views on growth support and enablement

When asked where broker-dealers should prioritize investments to improve technology capabilities, advisors point to a short list of practical, day-to-day functions that directly affect efficiency and client experience: account opening and client onboarding (22%), paperwork automation (15%), client-facing tools (15%), and financial planning tools (10%).

Beyond technology, advisors say more training and better awareness of available tools would help. More than eight in ten advisors (82%) say that better training and greater awareness of available technology would help them more effectively drive business growth, underscoring the importance of not only modern tools, but also education and enablement.

## AI as a core tool for client engagement

Adoption of generative AI is already widespread among advisors, with 51% reporting current use across at least one area of their business. Usage is highest among younger advisors, with 67% under age 45 leveraging AI tools, compared to 43% of advisors 65 and over. Adoption is also higher among larger practices, with 55% of advisors at firms managing \$50 million or more in assets reporting AI use, compared with 43% of smaller practices (managing less than \$50 million in assets).

On average, advisors using AI report applying it in two areas: client engagement (29%) and marketing (21%). These findings underscore AI's growing role in improving efficiency, scaling engagement, and supporting advisor growth.

"Client expectations are rising as investors adopt a digital-first mindset and have access to more information about financial products and investment options than ever before," said Dale Brown, President & CEO of FSI. "Across the independent financial services industry, momentum is building around the adoption of AI and other emerging technologies to increase efficiency and elevate the client experience. Innovative digital tools create a powerful opportunity to enhance client services, strengthen advisor-client relationships and support sustainable growth, while helping independent advisors and firms build lasting relationships with the next generation of investors."

## Growing investor demand for specialty asset classes outpaces advisor confidence

The study shows a clear increase in investor interest across non-traditional investment categories, yet very few advisors feel very confident advising on specialty investment products. More than half of advisors (53%) report

growing client interest in cryptocurrency, despite ranking cryptocurrency as their lowest priority and nearly half (48%) reporting that they need to build their knowledge on the asset class.

Similarly, 31% of advisors report increased client demand for alternatives; however, confidence is higher as 77% of advisors feel confident in their ability to advise clients on these investments.

In addition to education, advisors also report that technology is a key enabler of their ability to manage alternative investments on behalf of clients. Thirty-eight percent of advisors note that technology has improved tracking, performance, and analytics monitoring, and 37% cite that technology overall has increased their access to alternative investment opportunities.

## Methodology

This survey was a joint initiative between Broadridge and FSI, and conducted by 8 Acre Perspective Corp. A total of 428 financial advisors and employees of financial advisory firms completed the survey, which was fielded from Aug. 4-28, 2025.

## About Broadridge

Broadridge Financial Solutions (NYSE: BR) is a global technology leader with trusted expertise and transformative technology, helping clients and the financial services industry operate, innovate, and grow. We power investing, governance, and communications for our clients – driving operational resiliency, elevating business performance, and transforming investor experiences.

Our technology and operations platforms process and generate over 7 billion communications annually and underpin the daily average trading of over \$15 trillion in equities, fixed income, and other securities globally. A certified Great Place to Work®, Broadridge is part of the S&P 500® Index, employing over 15,000 associates in 21 countries. For more information, visit [www.broadridge.com](http://www.broadridge.com).

## About the Financial Services Institute

The Financial Services Institute (FSI) is the only organization advocating solely on behalf of independent financial advisors and independent financial services firms. Since 2004, through advocacy, education and public awareness, FSI has successfully promoted a more responsible regulatory environment for over 60 independent financial services firm members and their 130,000+ affiliated financial advisors – which comprise over 45% of all producing registered representatives. We effect change through involvement in FINRA governance as well as constructive engagement in the regulatory and legislative processes, working to create a healthier regulatory environment for

our members so they can provide affordable, objective advice to hard-working Main Street Americans.

For more information, please visit [financialservices.org](https://www.financialservices.org)

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