

Broadridge Acquires Retirement Plan Technology Provider iJoin

2025-09-09

Combined capabilities will help record keepers, financial advisors, asset managers, and insurers improve retirement participant outcomes and unlock growth opportunities

NEW YORK, Sept. 9, 2025 /PRNewswire/ -- Global Fintech leader **Broadridge Financial Solutions, Inc.** (NYSE: BR) today announced that it has acquired **iJoin**, a leading retirement plan technology provider specializing in participant onboarding, engagement, and analytics solutions for the retirement industry.

"With increasing demand for personalization, growing interest in lifetime income options, and the convergence of retirement and wealth management, there is a greater need for advanced tools and technology to enable record keepers, plan advisors, asset managers, and insurers to deliver plan participants better onboarding experiences, education and advice," said Mike Tae, Group President of Funds, Issuer, and Data-driven Solutions, Broadridge. "There are strong synergies between iJoin's innovations in plan participant data aggregation and standardization, its managed account and income technologies, and Broadridge's retirement plan servicing capabilities. Together, the solutions will help providers across the retirement ecosystem deliver stronger participant outcomes, accelerate growth and enhance efficiency."

Broadridge's retirement plan investment servicing, custody, analytics, and participant communications solutions will be complemented by iJoin's participant onboarding, managed accounts, retirement income, and data-driven engagement services. The combination will enable Broadridge to more holistically serve providers across the retirement ecosystem with leading retirement enrollment, data, and insights solutions.

"iJoin was founded on the belief that retirement should be more personal for everyone. Our mission has always been to help record keepers, plan advisors, and plan sponsors connect participants to highly personalized, goal-

based solutions that lead to better outcomes," said Steve McCoy, CEO of iJoin. "Partnering with Broadridge takes that mission to the next level. Their scale and trusted relationships create new opportunities to accelerate innovation, broaden our reach, and deliver greater value to clients and participants."

iJoin's capabilities enable record keepers to streamline participant enrollment into 401k plans, asset managers and insurers to more efficiently deliver managed account and income solutions, and advisors and their home offices to better identify participant cohorts and execute personalized education and outreach campaigns.

The transaction is not expected to have a material impact on Broadridge's financial results.

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 about us, please visit www.broadridge.com

Forward-Looking Statements

This press release and other written or oral statements made from time to time by representatives of Broadridge may contain "forward-looking statements" within the meaning of the Private Securities Litigation Reform Act of 1995. Statements that are not historical in nature, and which may be identified by the use of words such as "expects," "assumes," "projects," "anticipates," "estimates," "we believe," "could be," "on track," and other words of similar meaning, are forward-looking statements.

These statements are based on management's expectations and assumptions and are subject to risks and uncertainties that may cause actual results to differ materially from those expressed. These risks and uncertainties include those risk factors described and discussed in Part I, "Item 1A. Risk Factors" of our Annual Report on Form 10-K for the year ended June 30, 2025 (the "2025 Annual Report"), as they may be updated in any future reports filed with the Securities and Exchange Commission. All forward-looking statements speak only as of the date of this press release and are expressly qualified in their entirety by reference to the factors discussed in the 2025 Annual Report.

Broadridge Contact Information:

Investors

broadridgeir@broadridge.com

Media

VP Corporate Communications

Linda.Namias@broadridge.com

View original content to download multimedia:**<https://www.prnewswire.com/news-releases/broadridge-acquires-retirement-plan-technology-provider-ijoin-302550178.html>**

SOURCE Broadridge Financial Solutions, Inc.