

NEWS RELEASE

Broadridge Announces Distribution Insights for Asset Managers on Salesforce AppExchange

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Broadridge customers can now benefit from expanded metrics and analytics to increase sales conversion rates and grow revenue

NEW YORK, Oct. 24, 2024 /PRNewswire/ -- **Broadridge Financial Solutions** Inc. (NYSE: BR) today announced it has launched Distribution Insights for Asset Managers on Salesforce AppExchange, a leading enterprise marketplace for partner apps and experts, empowering customers to capture data from wherever it lives, strengthening analytics and insights with richer knowledge, context and reasoning, powered by Data Cloud.

Broadridge Distribution Insights for Asset Managers is currently available on AppExchange at

<https://appexchange.salesforce.com/appxListingDetail?listingId=e5bd5692-e63b-409a-aba3-3ca7e5125e64>.

Distribution Insights for Asset Managers on Salesforce

Distribution Insights for Asset Managers equips asset management sales teams with immediate access to accurate and actionable insights, providing sales workflow tools to win new flows and retain existing assets. Based on the output from Broadridge's powerful sales reporting, market analysis, and prospecting tools (Sales Analytics, Market Analytics, Opportunity Hunter), the solution is easy to configure, and enables customers to provide field sales personnel with contact management, sales automation and opportunity identification.

Comments on the News

"Our new Distribution Insights app, available on the AppExchange, is a cutting-edge combination of comprehensive sales and asset reporting, analytics, and Salesforce tools," said Dan Cwenar, President of Data and Analytics at

Broadridge. "Wholesalers and national accounts sales teams at asset managers and issuers can use it to more effectively meet their sales goals by seamlessly accessing the information needed to analyze opportunities within their territories and set up effective meetings with their distribution partners' top producers."

"Distribution Insights for Asset Managers is a welcome addition to AppExchange, as it accelerates business transformation for customers by delivering seamless data connectivity between platforms and providing firms with the ability to easily unlock the value of the combined data set to empower distribution management and the wholesaler experience in the moments that matter," said Alice Steinglass, Executive Vice President and General Manager, Platform, Salesforce. "AppExchange is constantly evolving to connect customers with the right apps and experts for their business needs."

Salesforce, AppExchange, Data Cloud and others are among the trademarks of Salesforce, inc.

About Broadridge

Broadridge Financial Solutions (NYSE: BR) is a global technology leader with the trusted expertise and transformative technology to help 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 per year and underpin the daily trading of more than \$10 trillion of securities globally. A certified Great Place to Work®, Broadridge is part of the S&P 500® Index, employing over 14,000 associates in 21 countries. For more information, please visit www.broadridge.com.

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