

# Broadridge Boosts Digital Marketing Suite, Powering Advisor Prospecting and Growth

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Wix-powered, mobile-first websites with built-in compliance review processes and performance insights - in addition to modern video tools - to provide scalable solutions to accelerate advisor growth

NEW YORK, Sept. 8, 2025 /PRNewswire/ -- Global Fintech leader **Broadridge Financial Solutions, Inc.** (NYSE: BR) is making strategic investments to enhance its advisor marketing solutions to more effectively empower wealth firms and their advisors to build their book of business. Launching improved website creation tools with Wix, and new video marketing capabilities will provide advisors with the critical digital front door experience needed to attract, engage, and retain today's investors.

Investor behavior is evolving, with rising demand for personalized advice, mobile-friendly platforms, AI-driven insights, and video content. At the same time, trillions of dollars are shifting to younger, more digitally native investors during the great wealth transfer, making a strong digital presence critical to standing out and reaching the next generation of investors. By combining Broadridge's proven wealth tech solutions with website technology from **Wix.com Ltd.** (NASDAQ: WIX), a leading global platform for creating, managing, and growing a complete digital presence, advisors will be equipped with the modern tools they need to serve the evolving needs of investors.

"These latest enhancements will address the marketing and technology challenges advisors and wealth firms are facing and position advisors to be future-ready so they can focus on client relationships while delivering impactful, compliant marketing," said Kristy Smith, General Manager of Broadridge Advisor Solutions. "An advisor's digital front door should act as a two-way exchange of insight, guiding clients with timely information while giving advisors data to better understand and anticipate client needs. By pairing innovation with compliance workflows, advisors have the tools to build trust and grow with confidence."

A recent **Broadridge study** found that 62% of advisors find their website ineffective at generating leads, and only 4 in 10 advisors are embracing personalization to share content targeted to client interests and life events. To help wealth firms adapt to the changing needs and expectations of investors, Broadridge is building the future of advisor marketing.

## Next-Generation Advisor Websites

Broadridge's updated Wix-powered website marketing solution will modernize website creation, addressing the unique needs of wealth management firms and their advisors by integrating Broadridge's compliance and analytics framework. This solution will make it easier for advisors to create and manage growth-focused, mobile-first websites without technical expertise. Advisors can leverage built-in compliance workflows, and performance insights to meet the expectations of modern investors.

Advisors and wealth firms will benefit from:

- Impactful website designs engineered to build trust and spark action from investors
- Tools that allow advisors to create visually compelling websites without coding or marketing expertise
- Compliance automation integrated into every step of the publishing process
- Personalization and branding features to showcase each advisor's unique value proposition
- Enterprise scalability for firms overseeing large advisor networks
- Built-in SEO and accessibility features to help attract and convert prospects

## Modern Video Marketing Solution

Broadridge is introducing new video marketing capabilities that make it simple for advisors to create professional, and engaging videos at scale. These tools enable fast, cost-effective production of high-quality, personalized content that drives engagement and conversions. The platform will streamline the entire video creation process, from scripting and recording to branding, compliance review, and multi-channel distribution.

Key features include:

- A growing library of pre-written, customizable scripts on timely investor topics
- An in-platform recording suite with teleprompter, retake/edit options, and real-time coaching to ensure optimal video quality
- Unified compliance approval workflows for faster, simpler reviews
- Robust analytics to measure engagement and campaign effectiveness across an advisor's or firm's network

Broadridge continues to invest in innovation to help advisors stay ahead of evolving client expectations. Broadridge

aligns with wealth firms and financial advisors to transform business processes, drive growth, and deliver personalized, marketing solutions that meet the evolving needs of the industry. Broadridge's capabilities provide a fully connected, omni-channel marketing environment, from websites to video to social and email campaigns.

## 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](http://www.broadridge.com)

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