

Broadridge Enhances Analytics, Enabling Asset Managers to Better Target Financial Advisors

4/13/2022

Enhancement enables accelerated distribution and identifies advisor demand for fund and ETF products

NEW YORK, April 13, 2022 /PRNewswire/ -- To help asset managers sharpen their distribution strategies and improve advisor segmentation, digital marketing and social media engagement, Fintech leader **Broadridge Financial Solutions, Inc.** (NYSE:BR) is incorporating **AdvisorTarget**'s advisor intent data into its analytics and advisory offerings. Broadridge's asset management clients will benefit from the integration of AdvisorTarget data, which identifies products of interest to advisors and increases data inputs for predictive analytics to help better match sales efforts with interested buyers.

Broadridge partners with asset managers to create data driven distribution strategies through advisor segmentation, scoring and customer journey mapping. The addition of advisor behavioral data from AdvisorTarget with Broadridge's distribution advisory offering will inform strategies based on both existing holdings and content engagement history. This combined view of holdings and advisor behavior data will enable asset managers to target advisors with greater precision and efficiency.

"The combination of Broadridge's distribution advisory expertise with AdvisorTarget data will enable distribution organizations to target the right advisor, with the right message, at the right time," said Tim Kresl, Principal of Distribution Insights, Broadridge. "Expanding our distribution advisory offering to include insights about the behaviors and interests of advisors is core to our strategy of providing asset managers with the information they need to stay relevant and drive growth."

The addition of advisor behavior data from AdvisorTarget also furthers Broadridge's strategy to enhance and support asset and wealth managers in their approach to digital engagement. The combination of AdvisorTarget

data with Broadridge's offerings helps asset managers identify advisors likely to respond to digital sales and servicing. Insights into advisor interest and intent to purchase fund and ETF products enables asset managers to provide targeted content, educate advisors about their products and build stronger, loyal relationships.

"With digital engagement becoming an increasingly important factor in serving advisors, access to advisor intent data can be the key ingredient in connecting with advisors in the most relevant way possible and expanding relationships and loyalty," concluded Mr. Kresl.

About Broadridge

Broadridge Financial Solutions (NYSE: BR), a global Fintech leader with \$5 billion in revenues, provides the critical infrastructure that powers investing, corporate governance, and communications to enable better financial lives. We deliver technology-driven solutions that drive business transformation for banks, broker-dealers, asset and wealth managers and public companies. Broadridge's infrastructure serves as a global communications hub enabling corporate governance by linking thousands of public companies and mutual funds to tens of millions of individual and institutional investors around the world. Our technology and operations platforms underpin the daily trading of more than \$9 trillion of equities, fixed income and other securities globally. A certified Great Place to Work®, Broadridge is part of the S&P 500® Index, employing over 13,000 associates in 21 countries. For more information about us, please visit [broadridge.com](https://www.broadridge.com).

About AdvisorTarget

AdvisorTarget is a market leader in providing behavioral intent data on financial professionals to the wealth and asset management industries. Through the utilization of AdvisorTarget's patented, auto-login technology applied to AdvisorTarget's proprietary media properties and white label partners, financial services companies can identify and predict the next move of financial professionals to provide them with products and services they demand. AdvisorTarget delivers off-the-shelf data packages that aid wealth and asset managers with new client acquisition, cross sell opportunities and asset and advisor retention. The company also develops custom built solutions in consultation with its clients.

Media contacts:

Broadridge

Matthew Luongo

Prosek Partners

+1 646-818-9279

mluongo@prosek.com

AdvisorTarget

Julia Horti

Head of Marketing

julia.horti@advisortarget.co

View original content: <https://www.prnewswire.com/news-releases/broadridge-enhances-analytics-enabling-asset-managers-to-better-target-financial-advisors-301524071.html>

SOURCE Broadridge Financial Solutions, Inc.