

Broadridge Fi360 Solutions Annual Conference to Explore State of ESG Investing, Fiduciary and Financial Wellness

4/6/2021

2021 agenda features thought-provoking discussions from industry leaders, learning sessions and workshops

NEW YORK, April 6, 2021 /PRNewswire/ -- Broadridge Fi360 Solutions, the nation's leading provider of fiduciary-related education and technology, has unveiled the agenda and keynote speakers for its **2021 Annual Conference**, which will take place virtually from May 17 to May 20, 2021.

For the first time, Broadridge's Matrix Trust Company and Fi360 Solutions are combining their two annual conferences to form the Broadridge Fi360 Solutions Conference, the industry's premier professional development conference. Founded in 2004, the conference delivers practical, fiduciary-based content through insightful educational sessions and compelling workshops where financial advisors and other industry professionals can exchange ideas and learn from industry thought leaders. Attendees will earn up to 15 CE credits.

Keynote speakers at the 2021 conference include:

- Martin Jarzebowski, Director of ESG & Responsible Investing at Federated Hermes, and Harvard Law School Professor Robert H. Sitkoff, who will frame ESG investing in today's complex market. Professor Sitkoff will bring critical insight and clarity on a topic of increasing importance to fiduciaries and the retirement channel, while Mr. Jarzebowski will explain how ESG integration supports long-term wealth creation. The panel will be moderated by Mary Green, ESG Client Portfolio Manager at Federated Hermes.
- Jason Dorsey, President at The Center for Generational Kinetics (CGK), who will unveil the results of a national study conducted by Broadridge and the CGK on how working Americans are searching for financial solutions in the COVID-19 era and beyond.

- Blaine Aikin, Founder and Principal of Fiduciary Insights, who will speak on the state of fiduciary in the industry. Mr. Aikin is a fiduciary subject matter expert and author of numerous articles on fiduciary responsibility and investment management.

In addition to the keynote sessions, attendees will have the opportunity to tune into 35 unique educational sessions led by prominent industry influencers and covering a range of topics, including the state of fiduciary in the industry, tips for working with charitable boards, fundamental concepts in working with high-net-worth individuals and the evolution of retirement investing. Featured speakers include Fred Reish, Rebecca Hourihan, Jason Roberts, Vanessa Bechtel, David Blanchett and others.

To view the full agenda and register, please visit the **[Broadridge conference information and registration page](#)**.

Broadridge Fi360 Solutions provides fiduciary education, training and technology to help financial intermediaries use prudent fiduciary practices to profitably gather, grow and protect investors' assets. Fi360 Solutions is the home of the Accredited Investment Fiduciary® (AIF®) Designation, the Fiduciary Focus Toolkit™, CEFEX and the Fi360 Fiduciary Score®.

About Broadridge

Broadridge Financial Solutions (NYSE: BR), a global Fintech leader with over \$4.5 billion in revenues, provides the critical infrastructure that powers investing, corporate governance and communications to enable better financial lives. We deliver technology-driven solutions to 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. In addition, Broadridge's technology and operations platforms underpin the daily trading of on average more than U.S. \$10 trillion of equities, fixed income and other securities globally. A certified Great Place to Work®, Broadridge is a part of the S&P 500® Index, employing over 12,000 associates in 17 countries. For more information about us and what we can do for you, please visit **www.broadridge.com**.

Media Contacts:

Matthew Luongo

Prosek Partners

+1 646.818.9279

mluongo@prosek.com

Linda Namias

Broadridge Financial Solutions

+1 631-254-7711

Linda.Namias@broadridge.com

View original content:<http://www.prnewswire.com/news-releases/broadridge-fi360-solutions-annual-conference-to-explore-state-of-esg-investing-fiduciary-and-financial-wellness-301262782.html>

SOURCE Broadridge Financial Solutions, Inc.

