

Broadridge Launches New Financial Advisor Productivity Integrations for Salesforce Financial Services Cloud Customers

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Broadridge's books and records data consolidation, securities lending and financial advisor marketing systems will help Salesforce customers streamline workflows and enhance advisor productivity

NEW YORK, Sept. 12, 2023 /PRNewswire/ -- **Broadridge Financial Solutions** Inc. (NYSE: BR) announces a collaboration with **Salesforce** (NYSE: CRM) to help wealth management firms scale their businesses, accelerate digital transformation, reduce cost, mitigate risk and increase advisor productivity. Through this collaboration, Broadridge's books and records data consolidation, securities lending and financial advisor marketing systems will be available to **Salesforce Financial Services Cloud** (FSC) customers.

The collaboration enables Salesforce FSC customers in the wealth management space to streamline workflows and enhance advisor productivity. Three of Broadridge's solutions will be available to Salesforce FSC customers, including:

- Books and records and CRM data consolidation to enable real-time, bi-directional data integration between the Broadridge and Salesforce platforms
- A securities-based lending (SBL) application that enables advisors to offer SBL, understand book trends, target high propensity prospects, and originate and monitor for SBL loans
- Broadridge's AdvisorStream content marketing platform that streamlines digital marketing processes, enables advisors to see client engagement with AdvisorStream content, and allows advisors to share personalized communications with clients through their preferred channels

"We are bringing a new synergy to wealth management firms, where our solutions will offer a seamless integration

between two key platforms and ultimately result in enhanced advisor productivity," said Mike Alexander, President of Wealth Management at Broadridge. "At a time when the wealth management industry is focused on accelerating their digital transformation efforts, we are proud to expand our work with Salesforce to drive that growth."

The books and records data consolidation connector is available from the [MuleSoft Anypoint Exchange](#) and the securities lending and AdvisorStream financial advisor marketing solutions will be released on the [Salesforce AppExchange](#) in Q4 2023.

"Financial Services Cloud is a must-have solution for financial institutions looking to deliver compelling advisor experiences while also creating more efficiencies thanks to the combination of data, AI and CRM," said Michelle Feinstein, VP and GM, Wealth and Asset Management at, Salesforce. "Making Broadridge's advisor productivity tools available for Financial Services Cloud customers allows organizations to deliver growth-enabling technology on a single platform, giving advisors a complete view of their clients and enabling a richer, more productive experience."

Salesforce, Financial Services Cloud, MuleSoft Anypoint Exchange, AppExchange and others are among the trademarks of Salesforce, Inc.

About Broadridge

Broadridge Financial Solutions (NYSE: BR), a global Fintech leader with over \$6 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 \$10 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 14,000 associates in 21 countries.

For more information about us and what we can do for you, please visit www.broadridge.com.

About Salesforce

Salesforce empowers companies of every size and industry to connect with their customers through the power of AI + data + CRM. For more information about Salesforce (NYSE: CRM), visit: www.salesforce.com.

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