

NEWS RELEASE

Broadridge Partners with LPL Financial to Win 2025 Datas Impact Award for Best Innovation in Client Engagement & Communication

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Datos recognizes Broadridge's Wealth InFocus, deployed with LPL Financial, as a technological breakthrough for deeper client relationships and accelerated digital adoption in wealth management

NEW YORK, Oct. 23, 2025 /PRNewswire/ -- Global Fintech leader, **Broadridge Financial Solutions Inc.** (NYSE: BR), has been named a winner of the prestigious 2025 Datas Impact Award in Wealth Management for Best Innovation in Client Engagement & Communication.

Deployed with LPL Financial, the award recognizes the rollout of **Wealth InFocus**, Broadridge's flagship omni-channel digital-first client communication platform that modernizes and personalizes the delivery of essential financial information while promoting stronger digital engagement between investors, advisors, and financial institutions.

"By rethinking a long-standing industry pain point, Broadridge in partnership with LPL Financial demonstrated how design-led innovation and deep collaboration can transform client engagement," said Wally Okby, strategic advisor of wealth management at Datas Insights. "The Datas Impact Award underscores Wealth InFocus not only as a technical breakthrough but as a strategic lever for deeper client relationships and accelerated digital adoption in wealth management."

"With a strong desire to enhance the end-client experience and strengthen the advisor/investor relationship while differentiating the advisor experience, we embraced new technology to create a better client communication experience," said Scott Belous Executive Vice President, Investor Experience at LPL Financial.

LPL and Broadridge partnered to reengineer LPL's communications workflow to reduce complexity and cost of serving their clients. Instead of fragmented systems and multiple vendors, Wealth InFocus leverages a single-platform communications ecosystem hosted by Broadridge, enabling consistent omni-channel delivery.

"Wealth InFocus delivers modernized, digital-first communications that are clear, personalized, and visually engaging—while meeting regulatory expectations. In this highly regulated industry, client communications have historically been complex, lengthy, and compliance heavy. Statements, tax documents, and correspondence can be challenging for investors to find meaningful, digestible information. Wealth InFocus switches the paradigm on that," said Doug DeSchutter, Broadridge president of ICS. "And LPL has been an incredible partner, with their tremendous focus and keen expertise on driving a better client experience through optimizing and digitizing client-advisor communications."

Key features and benefits of Broadridge's Wealth InFocus solution include:

- Optimized content for a premier digital first experience superior to static PDFs online.
- Highlighted, simplified financial insights and interactive data visualization.
- Personalized branding and advisor contact information for stronger client-advisor connection.
- Streamlined statements that improve readability and reduce content by 10–15%.
- An omni-channel experience that integrates digital, mobile, and print delivery, with microsites offering engaging summaries.
- Built-in pathways leading investors toward digital adoption and preference management.
- Improved investor understanding and engagement via microsites and interactive content.
- Increased advisor satisfaction through fewer client inquiries and more relationship-focused time.
- Modern, efficient communications delivered through a digital-first gateway experience, with flexible distribution options that drive engagement and foster paperless adoption.

Broadridge and LPL highlight that ongoing engagement and iterative enhancements will keep the platform agile and continue to push the boundaries of client communication innovation.

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, please visit www.broadridge.com.

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