

Broadridge Teams with MX to Power Data Aggregation and Financial Wellness Solution

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Broadens set of digital engagement tools for wealth management firms

NEW YORK, Oct. 11, 2022 /PRNewswire/ -- To provide financial advisors with an innovative holistic view into all aspects of an investor's financial journey, global Fintech leader, **Broadridge Financial Solutions**, Inc. (NYSE: BR), today announced a strategic partnership with open finance leader **MX** to utilize the company's financial data aggregation and personalized financial management automation solutions. This is another example of providing wealth management firms with value-driving, differentiating point solutions to optimize advisor productivity and insights for client growth and transformation.

This solution will provide financial advisors with a 360° customer view and enable Broadridge to enhance its enterprise expertise, deliver personalized financial insights at scale and strengthen data governance with MX's secure money management platform and automated financial health insights. As a result, financial advisors will have complete access to actionable information across their clients' assets and liabilities, better equipping them to provide relevant recommendations for long-term financial success.

"Investors today have an unprecedented level of control over their assets, but the current market environment has reminded us that it is still beneficial to have access to the personal touch of an advisor. Through this strategic partnership with MX, we are ensuring that the advisor's touch is not just personal, but also timely and driven by intelligence and data," said Mike Alexander, President of Wealth Management at Broadridge. "By combining Broadridge's expertise in investment data with MX's deep understanding of frictionless money experiences, our financial advisor clients will now have access to a new comprehensive offering that provides a more personal and holistic view to financial planning."

MX is building the largest open finance ecosystem to help people improve their financial lives. With MX, organizations like Broadridge can securely access and act on the world's financial data through trusted connections and state-of-the-art data enhancements. This is part of a broader set of digital engagement tools available on Broadridge's Wealth Platform, an open, component-based ecosystem with a flexible, scalable platform powered by an aggregated data layer. The Broadridge Wealth Platform is designed to help firms drive innovation, perform more effectively at scale and deliver a digital, modernized client and advisor experience.

"Our integration with Broadridge demonstrates our shared commitment to power the open finance economy by empowering financial institutions and the investment community, with data driven insights," said Don Parker, Executive Vice President of Partnerships, MX. "MX makes data accessible and actionable, and our partnership with Broadridge will help advisors and investors build a stronger, more modern data infrastructure."

The MX tools that are being integrated and embedded in Broadridge's Data Aggregation solution will provide advisors with a robust suite of financial wellness capabilities that are easy-to-use digital tools to provide insight into a client's everyday financial life.

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 U.S. \$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 14,000 associates in 21 countries.

For more information about Broadridge, please visit www.broadridge.com.

About MX

MX Technologies, Inc., a leader in Open Finance, makes data accessible and actionable for everyone. MX is building the largest open finance ecosystem to help drive innovation and improve experiences through secure and reliable access to financial data. MX combines trusted open finance APIs with enhanced financial data to quickly and securely connect to and verify data for hundreds of use cases including account opening, money movement, and underwriting. To learn more, follow us on Twitter @MX or visit www.mx.com.

Investors:

Edings Thibault

Head of Investor Relations, Broadridge

+1 516-472-5129

Edings.Thibault@broadridge.com

Media:

Gregg Rosenberg

Corporate Communications, Broadridge

+1 212-918-6966

Gregg.Rosenberg@broadridge.com

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