

Broadridge and WealthFeed Partner to Offer End-to-End Advisor Lead Generation and Intelligent Nurturing

2025-09-25

New partnership enables advisors to find and automatically nurture investors as they experience key life events

NEW YORK, Sept. 25, 2025 /PRNewswire/ -- **Broadridge Financial Solutions** Inc. (NYSE: BR), a global Fintech leader, today announced a new strategic partnership and minority investment in **WealthFeed**, a leading cloud-based platform that leverages AI capabilities to power lead generation and deepen existing relationships for financial advisors. The partnership brings together WealthFeed's AI prospecting and real-time money-in-motion insights with Broadridge's market-leading AdvisorStream marketing platform, helping advisors find, educate and nurture investors through key life events.

"We're excited to partner with WealthFeed to equip advisors with the best tools to help them engage the next generation of digital-first investors," said Mike Alexander, President of Broadridge Wealth Management. "This integration provides advisors with the digital tools needed to drive growth, freeing them to focus on personalizing service and helping investors achieve their financial goals, while also strengthening Broadridge's growing partner network to deliver end-to-end value for the wealth management industry."

Broadridge's financial advisor marketing solution is live as a standard feature within WealthFeed's SaaS platform for Independent Advisors, RIA home offices and enterprises. This collaboration will bolster WealthFeed's lead generation and prospecting capabilities with premium licensed content and automated nurturing capabilities for advisors to engage with clients and prospects. Leveraging WealthFeed's ability to monitor for money-in-motion events, advisors will also be able to identify moments in time to engage with clients and prospects. WealthFeed's comprehensive data set has also been enhanced by Broadridge's InvestorView data, providing predictive insights on a prospect's potential investable assets.

"Partnering with Broadridge is a transformative moment for WealthFeed and the advisors we serve. By uniting our real-time money-in-motion insights with Broadridge's proven digital engagement platform, we're giving advisors the ability to act on key life events with precision and scale," said Sam Kendree, Co-Founder and CEO of WealthFeed. "This integration turns data into action, enabling advisors to nurture opportunities with personalized communication, deepen relationships, and drive measurable growth."

Broadridge's investment will help fund WealthFeed's rapid growth and extensive product roadmap. By connecting unique lead-generation datasets with digital engagement and content marketing tools, Broadridge and WealthFeed are enabling advisor groups to accelerate new client acquisition and increase asset retention.

This partnership reflects the power of Broadridge's expanding partner ecosystem, which already includes leaders such as **Salesforce**, **Uptiq**, **YourStake** and **Wix**, along with other innovative firms across secure collaboration, lending, data enrichment, practice management, advisor marketing, and compliance. Broadridge is uniquely positioned to help advisors and enterprises accelerate growth and improve outcomes in a rapidly evolving wealth landscape by bringing together complementary capabilities, enabled by the flexibility of its open architecture platform, where firms can easily combine their own solutions, third-party fintech and Broadridge innovations.

An educational webinar exploring how advisors can find new clients and intelligently nurture them based on investors' key life and money-in-motion events will take place on October 15, 2025. Session details can be accessed **here**.

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 about us, please visit www.broadridge.com

About WealthFeed

WealthFeed is an AI-driven prospecting platform built for financial advisors, by financial advisors. Leveraging enriched, real-time data, it identifies high-intent, money-in-motion prospects and automates personalized outreach to enhance engagement, client retention, and long-term growth. WealthFeed's intuitive and SOC 2 Type II-compliant platform empowers advisors to own their data and their time, so they can focus on what matters most: serving clients and their families.

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