

# Everest Group Positions Broadridge in the Highest Leader Position in Market Impact and as a Star Performer in Wealth Management Products PEAK Matrix® Assessment 2024

2024-12-10

Everest Group PEAK Matrix® highlights Broadridge's relative market success and overall capability of technology based on performance, experiences, ability, and knowledge

NEW YORK, Dec. 10, 2024 /PRNewswire/ -- **Broadridge Financial Solutions, Inc.** (NYSE:BR), a global Fintech leader, today announces its recognition as the highest-designated Leader in Market Impact and a Star Performer in wealth management for the second year in a row by independent research firm **Everest Group** in their 2024 Wealth Management Products PEAK Matrix® Assessment.

"Broadridge's continuous investments in its wealth platform enable it to deliver better customer insights, enhanced engagement with clients, and more collaborative business opportunities," says Kriti Gupta, Practice Director, Everest Group. "The firm's expertise in developing out-of-the-box solutions and a robust partner ecosystem have set Broadridge apart from its peers. We're pleased to recognize Broadridge as a Leader in the Everest Group Wealth Management Products PEAK Matrix® Assessment 2024 and look forward to their future success."

"We are thrilled to be recognized by our clients and Everest Group for our commitment to providing exceptional service and a sophisticated digital platform to address the evolving needs of the wealth and asset management industries," said Mike Alexander, President of Wealth Solutions at Broadridge. "We believe that a fully integrated tech stack is central to achieving greater efficiency and a successful advisor-client partnership. As we look ahead to 2025, we are expanding our capabilities as we seek to modernize wealth management and help our clients and the industry better operate, innovate and grow."

In this report, Everest Group evaluated 17 leading wealth management technology providers on information submitted in calendar year 2024 in areas including interactions with IT service providers, client reference checks and ongoing analysis of wealth management products market. Leading firms exhibited the following:

- Comprehensive coverage and innovation across the value chain and invest heavily in advanced technologies such as Artificial Intelligence (AI) and Machine Learning (ML), and API integrations. By understanding market challenges and market trends, and evolving needs of the next generation of investors, Leaders enhance business operations and provide innovative products and services.
- Enhance client experiences through hyper-personalized services and strategic partnerships. Leaders maintain a robust partnership ecosystem with WealthTechs, FinTechs, and system integrators to drive further innovation and ensure a well-rounded approach to address client needs and market demands.

Broadridge delivers a suite of innovative, API-first, market-ready component solutions designed to deliver what's top of mind for every wealth management firm, personalizing the investor experience, driving advisor revenue and productivity, digitizing investment and enterprise operations, and delivering cost efficiencies. Broadridge's open ecosystem allows wealth management firms to build top-tier solutions by combining their proprietary solutions, Broadridge solutions, and third-party solutions into one platform, helping them to transform on their own terms and modernize key parts of their tech stack in line with their strategic needs.

## About Broadridge

Broadridge Financial Solutions (NYSE: BR) is a global technology leader with the trusted expertise and transformative technology to help 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 per year and underpin the daily trading of more than \$10 trillion of 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.

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