

Money Concepts Capital Corp. Enhances Advisor Productivity and Client Servicing Capabilities with Broadridge

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Leveraging Broadridge Wealth Data Aggregation and Financial Reporting enables Money Concepts to create their wealth platform for the future

NEW YORK, July 6, 2023 /PRNewswire/ -- **Money Concepts Capital Corp.** has enhanced its data management technology with the implementation of Wealth Data Aggregation and Financial Reporting from global Fintech leader **Broadridge Financial Solutions, Inc.** (NYSE: BR). This data aggregation, reporting and analytics solution will provide Money Concepts advisors with a holistic view of each client's holdings and activity across thousands of sources, gleaning insights that will enable better decision making and the provision of hyper-personalized services.

"Our objective is to provide effective solutions for today while always maintaining a vision for the future needs of our professionals," said Denis Walsh, president and CEO of Money Concepts. "Broadridge's solution is enabling us to optimize advisor productivity and gain unique insights for client growth and transformation. In a seamless and relatively quick process, we were able to shift away from legacy technology and transfer five years' worth of historical transactions without any delays or resistance of change from advisors typically inherent in an aggregation conversion."

"As validated in Broadridge's latest **Digital Transformation Study**, wealth management firms are accelerating their digital transformation efforts, and it's more important than ever for wealth management firms to modernize their technology stacks to meet the changing needs of advisors and investors," said Mike Alexander, president of Wealth Management at Broadridge. "We're pleased that Money Concepts has chosen Broadridge's solution to transform their data management, enabling them to keep pace with current technology, provide the personalization needed to meet growing investor expectations, and support the digitization and streamlining of their advisor and investor

value chain."

Empowered insights

Broadridge's Data Aggregation and Financial Reporting is a multi-product technology and data solution that benefits wealth management firms by consolidating information about client assets under management, cash balances, positions, transactions, spending and more from thousands of sources, including banks. The aggregated data enables advisors to provide their clients with household-level reports and use prescriptive insights that adjust based on user feedback and peer comparison financial scoring. Recent solution enhancements have introduced new easy-to-use practice and book level dashboards for business intelligence, financial wellness and insights, providing a robust data platform for the future.

Broadridge Data Aggregation and Financial Reporting is part of the Broadridge Wealth suite of innovative, 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 enterprise operations, and delivering cost efficiencies. Powered by decades of financial services expertise and a proven track record of helping wealth managers drive growth and streamline their business operations, Broadridge is redefining the future of wealth management.

Learn more about Broadridge's Data Aggregation and Financial Reporting [here](#).

About Broadridge

Broadridge Financial Solutions (NYSE: BR), a global Fintech leader with more than \$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 90 countries.

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

About Money Concepts

Money Concepts Capital Corp. is a privately owned independent broker-dealer and dually registered as a Registered

Investment Advisor based in Palm Beach Gardens, FL. Established in 1979, and its parent company Money Concepts International, Inc. has a network of approximately 700 financial professional's centers nationwide.

In addition to serving independent advisors, Money Concepts® provides turn-key wealth management services for community banks, credit unions and tax professionals. Money Concepts® advisors provide holistic planning and offer a full array of non-proprietary products and services including advisory and alternative investment services.

All Securities Offered Through Money Concepts Capital Corp. | Member [FINRA](#) / [SIPC](#)

Money Concepts Advisory Service is a Registered Investment Advisor with the SEC

All Non Securities and Non Advisory Products through Money Concepts International, Inc. 11440 North Jog Road, Palm Beach Gardens, FL 33418. 561-472-2000.

For more information visit <http://www.MoneyConcepts.com/Advisor> and follow us on **Facebook**, Twitter and LinkedIn.

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