

OneDigital Financial Selects Broadridge Technology to Grow Retirement Practice and Enhance Advisor Efficiency

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NEW YORK, April 24, 2025 /PRNewswire/ -- As retirement planning grows more complex and advisory firms seek scalable, enterprise-wide solutions, **OneDigital Financial Services** has selected **Broadridge Financial Solutions, Inc.** (NYSE: BR) to enhance advisor efficiency and support its expanding retirement business. The partnership brings Broadridge's data aggregation, monitoring, reporting, and proprietary fund scoring capabilities to OneDigital's national platform. Through this implementation, OneDigital's advisors will gain more time to focus on helping plan sponsors run effective retirement programs, while the firm's home office benefits from robust compliance oversight and business intelligence tools.

"We've made ongoing investments to bring our retirement capabilities to a new level to help firms accelerate modernization. Our solution is grounded in high-quality data aggregation and reporting that automate workflows and integrate a firm's proprietary branding and fund scoring to make advisors more efficient and effective," said John Faustino, Head of Data and Insight Product and Strategy and Fiduciary Solutions, Broadridge. "We are thrilled to support OneDigital in helping their advisors create better outcomes for working Americans as they grow and scale their practices."

OneDigital will implement Broadridge's suite of retirement solutions including; Retirement Data Aggregation, Business Intelligence services, Fiduciary Focus Toolkit, RFP director, Fee Benchmark, and enterprise proprietary fund scoring solutions. OneDigital's advisors will be able to take advantage of capabilities and benefits such as investment monitoring reports with integrated OneDigital proprietary fund scoring, improved fund evaluations; streamlined service provider searches; business management reporting; compliance oversight utilities; and access to aggregated data for held away plans across recordkeepers.

"As our retirement plan business continues to grow, Broadridge's expertise and technology will support our retirement solutions at an enterprise-wide scale, which is crucial to the success of our business growth and development," said Frank Zugaro, National Vice-President of OneDigital Retirement Solutions. "Now more than ever, we will be able to deliver comprehensive, actionable data and metrics, investment insights and reporting in the OneDigital brand powered by Broadridge's fiduciary governance and enablement capabilities."

Broadridge will also integrate with OneDigital's existing capabilities, including allowing OneDigital to create sophisticated custom fund scoring capabilities to deliver investment research to the firm's advisors, the ability to tailor clear and well-designed reports in OneDigital's branding as well as deliver retirement plan data aggregation to support the business intelligence needs of management and compliance teams.

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.

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

About OneDigital

OneDigital's team of fierce advocates helps businesses and individuals achieve their aspirations of health, success and financial security. Our insurance, financial services and HR platform provides personalized, tech-enabled solutions for a contemporary work-life experience. Nationally recognized for our culture of caring, OneDigital's teams enable employers and individuals to do their best work and live their best lives. More than 100,000 employers and millions of individuals rely on our teams for counsel and access to fully integrated worksite products and services and the retirement and wealth management advice provided through OneDigital Investment Advisors. Founded in 2000 and headquartered in Atlanta, OneDigital maintains offices in most major markets across the nation. For more information, visit onedigital.com.

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responsibility only for its own products and services. Investment advisory services offered through OneDigital Investment Advisors, a wholly owned subsidiary of OneDigital.

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