



Edward Jones Selects Broadridge for Company-Wide Performance Reporting

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Aspire Performance Reporting Service Now Deployed for 12,000 Financial Advisors and Nearly Seven Million Clients

LAKE SUCCESS, N.Y.--(BUSINESS WIRE)-- Broadridge Financial Solutions, Inc. (NYSE:BR) today announced that financial services firm Edward Jones has implemented Broadridge's Aspire(R) Performance Reporting service for its nearly seven million retail clients. More than 12,000 Edward Jones financial advisors can now use Broadridge's Aspire Performance Reporting to deliver premium performance reporting to all of their clients - perhaps the largest on-demand performance reporting solution in the industry.

Norm Eaker, a principal at Edward Jones, said: "Now our 12,000-plus financial advisors are always ready when a client asks: 'How am I doing today?' Our financial advisors are thrilled with the high level of personal service they can offer to their clients. Broadridge's Aspire Performance Reporting service gave us a new and unique solution that made it technically and economically practical to take this step."

Greg Johnson, an Edward Jones financial advisor from Tennessee adds: "Having a succinct and understandable performance report adds to our ability to meet client needs. It will allow me to provide much better service in the future!"

"Edward Jones is one of the most highly-respected and nationally-recognized firms in our industry, and we're delighted to have them as the first client to take advantage of our new Aspire Performance Reporting service," said Charlie Marchesani, President, Securities Processing Solutions-US, Broadridge.

"We built our Aspire Performance Reporting engine with the goal of providing the differentiating capability for our users to cost-effectively offer performance reporting to all their clients. We are very proud to have worked with Edward Jones to implement Aspire Performance consistent with this goal and to provide exceptional value to all their financial advisors and clients," Mr. Marchesani added.

This deployment expands the extensive partnership between Broadridge and Edward Jones. Edward Jones also uses Broadridge's brokerage processing, tax-lot accounting, and other core processing services.

Broadridge's Aspire Performance Reporting service was built to offer tremendous functionality and economic value to broker-dealers looking to extend or enhance a performance offering for all their customers. Aspire provides dramatically higher capacity than ever before available, at dramatically lower cost-per-account, with a full range of highly sophisticated analytical capabilities. The service provides daily performance returns - calculated by security, strategy, account, household, and composite -- for any user-selected period. The service:

- Offers time- and dollar-weighted calculations, net or gross of fees
- Supports standard and composite benchmarks and provides extensive performance analytics, including standard deviation, Sharpe Ratio, alpha and beta statistics
- Provides multi-currency/multi-strategy processing and reporting

About Edward Jones

Edward Jones provides financial services for individual investors in the United States and, through its affiliate, in Canada. Every aspect of the firm's business, from the types of investment options offered to the location of branch offices, is designed to cater to individual investors in the communities in which they live and work. The firm's 12,000-plus financial advisors work directly with nearly 7 million clients to understand their personal goals -- from college savings to retirement -- and create long-term investment solutions that emphasize a well-balanced portfolio and a buy-and-hold strategy. Edward Jones embraces the importance of building long-term, face-to-face relationships with clients, helping them to understand and make sense of the investment options available today. Edward Jones, which ranked No. 2 on FORTUNE magazine's "100 Best Companies to Work For 2009," is headquartered in St. Louis. The Edward Jones Web site is located at www.edwardjones.com, and its recruiting Web site is www.careers.edwardjones.com. Member SIPC.

About Broadridge

Broadridge is a technology services company focused on global capital markets. Broadridge is the market leader enabling secure and accurate processing of information for communications and securities transactions among issuers, investors and financial intermediaries. Broadridge builds the infrastructure that underpins proxy services for over 90% of public companies and mutual funds in North America, processes more than \$3 trillion in fixed-income and equity trades per day, and saves companies billions annually through its technology solutions. For more information about Broadridge, please visit www.broadridge.com.

Source: Broadridge Financial Solutions, Inc.