



Broadridge Boosts Fiduciary Transparency Adding Fi360 Fiduciary Scores®

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NEW YORK, Oct. 23, 2018 /PRNewswire/ -- In response to customer and industry demand for greater fiduciary transparency, [Broadridge Financial Solutions, Inc.](#) (NYSE:BR), an S&P 500 company and global Fintech leader, announces the integration of the Fi360 Fiduciary Score within Broadridge's Distribution Insight platform. Broadridge's predictive analytics solution, [Opportunity Hunter](#), will include Fi360 Fiduciary Scores for each investment and enhanced advisor profiles, combining competitive intelligence on funds with advisor rankings.

"Prioritizing higher levels of fund and advisor transparency is more important than ever as a result of significant regulatory pressure including the fiduciary rule, SEC best interest proposal and ERISA litigation and settlements," said Dan Cwenar, Broadridge's head of asset management data and analytics. "By augmenting our distribution insight platform with Fi360 data, we are able to bring more transparency to the asset manager and financial advisor relationship, ultimately benefitting the end investor."

"Financial advisors rely on our products to improve transparency and perform due diligence on the information provided by their asset managers," said John Faustino, AIFA®, PPC®, Chief Product and Strategy Officer of Fi360. "It's only natural for asset management firms to have native visibility into the same fiduciary metrics on which their products are evaluated, and the integration with Broadridge will facilitate a stronger relationship between advisors and asset managers."

Fi360 provides fiduciary technology, education and data. The Fi360 Fiduciary Score is a transparent and objective investment rating system that provides the ability to compare peer investments and determine fiduciary appropriateness. By combining Fi360 scores with existing industry data and Broadridge proprietary data, Broadridge will provide a way for investment managers to measure themselves, their funds and their competitors by the same metrics that advisors trust.

Broadridge and Fi360 plan to expand this strategic partnership in the coming months with the addition of portfolio profiles within Broadridge's Distribution Insight platform.

About Broadridge

Broadridge Financial Solutions, Inc. (NYSE: BR), a \$4 billion global Fintech leader and a part of the S&P 500® Index, is a leading provider of investor communications and technology-driven solutions to banks, broker-dealers, asset managers and corporate issuers globally. Broadridge's investor communications, securities processing and managed services solutions help clients reduce their capital investments in operations infrastructure, allowing them to increase their focus on core business activities. With over 50 years of experience, Broadridge's infrastructure underpins proxy voting services for over 50 percent of public companies and mutual funds globally, and processes on average more than US \$5 trillion in fixed income and equity trades per day. Broadridge employs over 10,000 full-time associates in 18 countries. For more information about Broadridge, please visit www.broadridge.com.

About Fi360

Fi360, a fiduciary education, training and technology company, helps financial intermediaries use prudent fiduciary practices to profitably gather, grow and protect investors' assets. Since 1999, the firm has provided financial professionals with the tools necessary to act as a fiduciary in their work with investors. Headquartered in Pittsburgh, PA, Fi360 is the home of the Accredited Investment Fiduciary® (AIF®) designation, the Fiduciary Focus Toolkit™ and the Fi360 Fiduciary Score®. The Fi360 Fiduciary Score® represents an objective means of comparing investments according to set criteria and is not intended, nor should it be used as the sole source of information for reaching an investment decision. Fi360 is also the parent company of CEFEX.

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