



Broadridge and The Standard Offer Mutual Fund Partners Visibility into Asset Distribution on Retirement Plan Platforms

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LAKE SUCCESS, N.Y., Jan. 8, 2014 /PRNewswire/ -- [Broadridge Financial Solutions](#) (NYSE: BR) today announced that The Standard has selected Access Data, a Broadridge company, to provide DCIO Reporting to fund partners offering products on The Standard's retirement recordkeeping platform. Starting in the first quarter, defined contribution investment only (DCIO) reports will be available to The Standard's fund partners through a new technology portal designed to provide unprecedented access to asset, trading and sales information at a plan level. This engagement represents a milestone in the expansion of Access Data's services for retirement providers and its commitment to creating transparency in the industry among mutual funds, distributors, platforms and retirement plan providers.

(Logo: <http://photos.prnewswire.com/prnh/20110920/MM71626LOGO>)

With the new DCIO Reporting portal, fund firms offering products on The Standard recordkeeping platform will have timely access and enhanced visibility into sales across retirement plans, as well as a deeper understanding of the advisor selling those plans. This increased level of transparency will provide mutual funds with deeper insight into the advisor-driven retirement market comprised of The Standard and other independent recordkeeping platforms that partner with distributors to offer advisors complete turnkey retirement offerings for small and medium-sized defined contribution plans.

"The collaboration with Access Data and Broadridge to provide our fund partners with DCIO reporting was an easy decision for us," said Dan Hall, VP of Retirement Plan Sales, The Standard. "We view Broadridge as a strategic partner supporting our firm's growth; they already work with us across our platform to help us engage our participants with high impact statements, educational content and communications. Now leveraging their team's data management expertise, we will be able to provide business critical sales information to our fund partners and help accelerate the growth of our advisor-sold plan business."

Defined contribution assets are forecast to grow to \$6.7 trillion over the next five years, representing a significant opportunity for mutual funds to increase assets. The key to unlocking that growth lies in knowing where those opportunities exist. The fastest growth segment for defined contribution assets is generated by the small to medium-sized plan segment supported by independent recordkeeping platforms.

Access Data is a leading provider of data management and reporting services for fund firms. Its *DCIOConnect* offering aggregates and cleanses data across 18 leading independent recordkeeping platforms and the advisor-driven plan market. "As part of Broadridge, Access Data is uniquely positioned to connect retirement recordkeepers with their fund partners to provide important information that helps them grow their businesses," stated Frank Polefrone, Senior Vice President, Access Data. "DCIO reporting and retirement market intelligence is important to both our fund and retirement recordkeeping clients, and we are expanding our offerings to empower our clients to capture asset growth from defined contribution plans."

About Access Data

Access Data Corp., a Broadridge company, is a leader in enterprise data management, analysis and reporting for the financial services industry - providing data and reporting solutions covering 90% of all long-term fund assets and 95% of all ETF assets. Leading asset management firms and financial intermediaries utilize Access Data's proprietary technology and services to gain visibility into how sales and assets are generated and address a myriad of challenges in distribution, compensation management and compliance and risk management. Access Data's flagship product, Access Data SalesVision[®] provides comprehensive storage and analysis solutions, delivering web-based reporting as Software as a Service. Please visit broadridge.com/accessdata.

About Broadridge

Broadridge Financial Solutions, Inc. (NYSE:BR) is the leading provider of investor communications and technology-driven solutions for broker-dealers, banks, mutual funds and corporate issuers globally. Broadridge's investor communications, securities processing and business process outsourcing 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 90% of public companies and mutual funds in North America, and processes more than \$5 trillion in fixed income and equity trades per day. Broadridge employs approximately 6,400 full-time associates in 13 countries. For more information about Broadridge, please visit www.broadridge.com.

About The Standard

The Standard is a leading provider of financial products and services, including group and individual disability insurance, group life and accidental death and dismemberment insurance, group dental and vision insurance, absence management services, retirement plans products and services, individual annuities and investment advice. For more information about The Standard, visit www.standard.com.

The Standard is the marketing name for StanCorp Financial Group, Inc. and its subsidiaries. StanCorp Equities, Inc., member FINRA, wholesales a group annuity contract issued by Standard Insurance Company and a mutual fund trust platform for retirement plans. Third-party administrative services are provided by Standard Retirement Services, Inc. Investment advisory services are provided by StanCorp Investment Advisers, Inc., a registered investment advisor. StanCorp Equities, Inc., Standard Insurance Company, Standard Retirement Services, Inc. and StanCorp Investment Advisers, Inc. are subsidiaries of StanCorp Financial Group, Inc. and all are Oregon corporations.

Media Contacts:	
For Access Data	

Linda Namias	Maggie Nolan
Broadridge Financial Solutions	Brainerd Communicators, Inc.
+1 631-254-7711	+1 212-986-6667
linda.namias@broadridge.com	nolan@braincomm.com
For Standard Retirement Services	
Bob Speltz	
The Standard	
+1 971-321-3162	
bob.speltz@standard.com	

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