

# Broadridge Smart Insights™ Empowers Next-Gen Bionic Advisors with Prospect Intelligence and Insights to Grow their Business

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NEW YORK, July 10, 2018 /PRNewswire/ -- [Broadridge Financial Solutions, Inc.](#) (NYSE:BR), a global fintech leader and new addition to the S&P 500 Index, today unveiled **Broadridge® Smart Insights™**, a new cloud-based wealth management solution that helps advisors connect more meaningfully with clients and prospects. Leveraging predictive analytics, Broadridge Smart Insights helps advisors sharpen their client acquisition strategy by providing detailed profiles and insights into clients who are an optimal "fit" for their practice. The solution combines consumer demographic, financial and behavioral information and Broadridge datasets with machine learning and proprietary technology within a secure, multi-channel platform.

A recent [whitepaper](#) published by research firm ESI ThoughtLab and Broadridge found that only 25% of wealth advisors leverage data and analytics to understand clients and fewer than 10% use AI within their current practices.

"Advisors we've polled simply don't have the time to keep up with servicing clients while coping with the increasing demands of running their practices. Broadridge Smart Insights empowers advisors to be more productive and efficient, by placing the latest technology and analytics at their fingertips, enabling them to grow relationships and their businesses with the right data and insights at the right time," said Steve Scruton, President of Broadridge Advisor Solutions. "We are helping our clients and their advisors become bionic, leveraging new technology and data to scale and transform their business, enrich their customer engagement, optimize their efficiency and generate growth."

Using artificial intelligence and advanced analytics, Broadridge Smart Insights supports enhanced prospect profiles and automated content recommendations to help advisors engage clients and prospects more effectively – maximizing the workday while growing ROI. Advisors will be provided with timely and relevant content to share with clients and prospects through email, social media and other channels. The platform will score prospect and advisor attributes to enable advisors to pursue relationships that are most likely to be successful.

"In today's digital environment, personal insights are just as critical to a financial advisor's practice as exceptional financial acumen," said Salvatore Sodano, Vice Chairman of Broadridge Advisor Solutions. "Smart Insights arms advisors with the information they need to make timely, authentic personal connections with clients and prospects while providing a heightened level of customer service."

Broadridge Smart Insights is the latest release from Broadridge's integrated wealth management solutions product suite, which supports more than 225,000 financial advisors and numerous wealth management firms. This is another example of how Broadridge helps companies transform their business by enriching customer engagement, optimizing efficiency, navigating risk and generating growth. To learn more about Broadridge Smart Insights or to schedule a demo, please visit [Broadridge.com/smartinsights](#).

## About Broadridge

Broadridge Financial Solutions, Inc. (NYSE:BR) a global fintech leader with more than US\$4 billion in annual revenue, provides investor communications and technology-driven solutions for broker-dealers, banks, 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 more than US\$5 trillion in fixed income and equity trades per day. Broadridge employs approximately 10,000 full-time associates in 16 countries.

## Media

Matthew Luongo  
Prosek Partners  
+1 646-396-0966  
[mluongo@prosek.com](mailto:mluongo@prosek.com)

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