

The Smart Way to Grow



Drive growth, enhance communications and optimize your practice with a suite of advisor solutions designed specifically for you.

Not every advisor works the same way or shares the same goals. Priorities vary and strategies change. No matter what challenge you confront, Broadridge has the tools and resources you need to set yourself apart.

Whether you're just getting started or nearing your peak, our unique advisor solution packages support your practice every step of the way.



Broadridge®

**ADVISOR
SOLUTIONS**

Build and Grow

Turn Our Experience into Your Success

We made it easy to select the right solutions for your business, offering sensible packages of our most practical solutions so you can have the tools you need, right away. Drawing on years of advisor feedback and input, each package is thoughtfully assembled for your specific goals — and priced to maximize your ROI.



ATTRACT NEW CLIENTS AND INSTALL A FOUNDATION

- Gain visibility with a professional Web presence.
- Grow your business with existing contacts through email, social media and print.
- Get referred via digital networking tools.
- Increase your knowledge through continuing education.

THE GATEWAY SOLUTION INCLUDES:

Advisor Website

Sponsored Name Placement

Social Sharing

Advisor Resource Center

Continuing Education

Grow and Communicate



ENRICH CLIENT RELATIONSHIPS AND EXPAND YOUR BUSINESS

- Convert more prospects with turnkey seminar solutions.
- Amplify your message through consistent marketing campaigns.
- Engage clients on their terms via digital and print communications.
- Build referrals through social media prominence.

THE JOURNEY SOLUTION INCLUDES:

Advisor Website

Sponsored Name Placement

Social Sharing

eNewsletters

eCards

Advisor Resource Center

Seminars

Continuing Education

Preserve and Manage



RETAIN EXISTING CLIENTS AND DISTINGUISH YOUR PRACTICE

- Provide greater value and convenience with multi-channel accessibility.
- Strengthen relationships and stay in touch through eNewsletters and eCards.
- Cement your brand with digital media.
- Preserve the value of your business for succession.

THE DESTINATION SOLUTION INCLUDES:

Advisor Website

Social Sharing

eNewsletters

eCards

Advisor Resource Center

Continuing Education

Broadridge Advisor Solutions

BREAK OUT FROM THE CROWD | STRENGTHEN RELATIONSHIPS | ELEVATE YOUR REPUTATION

Solutions Available as Part of a Package or Separately

ADVISOR WEBSITE

Build and customize a website in minutes with innovative templates designed to reflect your personal brand.

PROPERTY AND CASUALTY WEBSITE

Attract more referrals, build credibility and offer helpful insurance information to your clients with a Property and Casualty insurance website.

SOCIAL SHARING

Easily post and share financial content from our FINRA-reviewed library across Facebook, Twitter and LinkedIn.

SPONSORED NAME PLACEMENT

Our solution places your listings on the first pages of search results, maximizing your online visibility.

ADVISOR RESOURCE CENTER

Leverage an extensive library of original content to share with clients, including articles, videos, calculators, Market Summaries and presentations.

SEMINARS

We provide thoughtful and professional comprehensive seminars as well as shorter, topic-focused presentations.

NEWSLETTERS

Keep in touch with branded, FINRA-reviewed newsletters with topics aimed at your target markets.

eCARDS

Send personalized digital greeting cards for birthdays, anniversaries, holidays and more.

CONTINUING EDUCATION

Our online tests satisfy continuing education requirements for many professional accreditations. We offer tests in several topic areas for advisors maintaining their CFP®, ChFC®, CLF®, CLU®, RHU® and REBC® certifications.

Solutions Available Separately

LOCAL BUSINESS LISTINGS

We ensure your business listings are search-engine optimized and registered with more than 70 local directories, including Google, Apple, Bing, Yelp and Yellow Book.

MOBILE APP: MY WEALTH ADVISOR

Reduce email overload and offer added convenience when you distribute content to clients' smartphones or tablets.

PRINT MARKETING

Whether you're sending an informational booklet, a quick tax reference or a timely market report, benefit from a wide variety of expertly designed print marketing materials.

CONNECTING PEOPLE, TECHNOLOGY AND INSIGHTS

Broadridge, a global fintech leader with over \$9 billion* in market capitalization, provides communications, technology, data and analytics solutions. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth. *As of November 2017

broadridge.com

Ready for Next

**Communications
Technology
Data and Analytics**

