

# Go beyond accurate with your data and reporting

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## ELEVATE THE PERFORMANCE OF YOUR ENTIRE ENTERPRISE WITH VERIFIED, ACTIONABLE INTELLIGENCE

- Industry-leading data aggregation, reporting and practice management solution.
- Reconciles, normalizes, aggregates and cleanses data to 99.9% accuracy.
- Enterprise Data Warehouse consolidates disparate data into a central repository for easy access.
- Flexible display and presentation options deliver actionable insights to improve decision-making.
- Includes over 4,500 custodial interfaces and robust third-party integrations.
- Backed by 20-year experience in enterprise data management for broker-dealers and advisors.

### BE CONSISTENTLY RIGHT

Gain a more complete, accurate and actionable view of data—so both your front and back office can achieve more with less effort. From cleaner data and comprehensive sources to in-depth reports and actionable insights, Broadridge Data Aggregation and Financial Reporting is the only industry-leading solution to offer you a true competitive advantage.

### CHOOSE TRUE AGGREGATION

Many so-called data aggregators are really data harvesters that obtain most of their data via screen scraping. Not Broadridge. We aggregate data directly from custodians to cover every asset type and use integrations for held-away data. Our team carefully cleans and reconciles your data to 99.9% accuracy, maximizing reliability across your internal systems and within financial reports.

### BENEFIT ENTERPRISE-WIDE

Specifically designed for enterprise-wide implementation, our systems ensure that the same, consistent data underpins all client and compliance interactions. Now you can support both front- and back-office operations with our golden source of data, and be confident that everyone has access to complete and current information.

#### COMPREHENSIVE



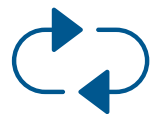
Delivers a 360-degree view of all client asset classes

#### CONVENIENT



Accessible via desktop, Investigo Data Model\*, API

#### CONSISTENT



Supports client and compliance interactions enterprise-wide

### CHOOSE BROADRIDGE

To go beyond accurate, turn to a mature fintech with a 20-year history of driving innovation and building foundational industry solutions. Broadridge delivers a singular level of customer service at every step—from implementation to ongoing maintenance and support.

## STEP UP TO THE ONLY DATA AGGREGATION SOLUTION THAT DELIVERS EVERY DAY, IN EVERY WAY

Data informs everything in your business: every client interaction, transaction, communication and every act of compliance. It's essential to get it right. Broadridge Data Aggregation and Financial Reporting consistently provides timely and accurate data, enabling you to focus on higher-level business challenges.

## GAIN A COMPLETE VIEW OF YOUR CLIENTS

Elevate client service when you access a comprehensive, consistent view of every client's portfolio. Through direct feeds from custodians and third-party relationships, our solution delivers a 360-degree view of all client assets, including:

- Brokerage accounts
- Direct business
- Insurance products
- Retirement accounts
- Held-away business

We enable access to client data regardless of custodian, across advisory firms, financial institutions, insurance providers and vetted open-architecture data. Now everyone from client-facing advisors to back-office personnel can see positions, transactions, spending, debts and more—all from a single source.

## EASY TO INTEGRATE, EASY TO USE

Delivered when and where you need it, via desktop, the Investigo Data Model\*, API and reporting modules, Broadridge Data Aggregation and Financial Reporting seamlessly integrates with any platform. You can structure client portfolios and households with ease. Intuitive dashboards and portfolio management tools facilitate analysis, improve performance and help identify opportunities for growth.

## ACHIEVE A COMPETITIVE EDGE

Whether you're a client-facing advisor or a compliance manager, now you can go beyond accurate to gain true intelligence that takes you beyond the competition. Set a rock-solid foundation across your enterprise with Data Aggregation and Financial Reporting from Broadridge.

**CALL YOUR BROADRIDGE REPRESENTATIVE TODAY, OR VISIT BROADRIDGE.COM**

\*The Investigo Data Model is a replicated data warehouse built for each client based on their account information and account information for held-away assets.



**AUTOMATIC DATA AGGREGATION**



**99.9% DATA ACCURACY**



**DATA WAREHOUSE**



**THIRD-PARTY INTEGRATIONS**



**INDUSTRY-SPECIFIC SCREENS AND REPORTS**



**QUICK HOUSEHOLDING AND CLIENT-PORTFOLIO GROUPING**



**READY-TO-USE CLIENT PRESENTATIONS**



**INTUITIVE PRACTICE MANAGEMENT TOOLS**

Broadridge, a global fintech leader with \$4 billion in annual revenue listed on the S&P 500 index, provides communications, technology, data and analytics. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth.

[broadridge.com](http://broadridge.com)

Ready for Next

Communications  
Technology  
Data and Analytics

