

Millennials are ready for you. Broadridge gets you ready for them.



An untapped market presents unprecedented opportunity.

RESEARCH ANALYSIS

24 ⁺ _M	70%	\$30 _T
MILLENNIALS DO NOT HAVE A RETIREMENT SAVINGS PLAN	LACK A FORMAL RELATIONSHIP WITH A FINANCIAL ADVISOR	WILL BE INHERITED BY MILLENNIALS IN THE NEXT FEW DECADES

THE RESEARCH Broadridge recently commissioned a major study to measure investor perceptions and attitudes related to wealth management and retirement. In partnership with The Center for Generational Kinetics (CGK), our team surveyed 1,003 U.S. respondents, aged 22 to 59. We asked questions designed to reveal how investors save for retirement and how expectations shape behavior.

Meet millennials where they are, on their terms.

RESEARCH ANALYSIS

In-person interactions build the most trust with a new financial advisor.

IN-PERSON	73%	78%	84%
PHONE CALL	45%	58%	63%
EMAIL	42%	33%	32%
TEXT	17%	11%	8%
VIDEO CHAT	15%	18%	10%
SOCIAL MEDIA	9%	2%	2%

Legend: MILLENNIALS (Green), GENERATION X (Blue), BABY BOOMERS (Dark Blue)

Ongoing, regular communication solidifies long-term trust.

70%

OF MILLENNIALS PREFER MONTHLY —OR MORE FREQUENT— COMMUNICATION

50%

SAY EMAIL IS THE PREFERRED METHOD OF COMMUNICATION

30%

VALUE REGULAR ALERTS TO HELP THEM SAVE MORE

35%

VALUE SOCIAL MEDIA OUTREACH

TAKE ADVANTAGE OF AUTOMATED SOCIAL MEDIA AND EMAIL MARKETING

Create customized emails with relevant content using our intuitive, automated platform. Send greeting cards for birthdays, anniversaries, holidays and more. Engage across all major social media sites to stay in front of clients and strengthen relationships with prospects.

- ✓ Integrated compliance review
- ✓ Content updated regularly
- ✓ Tracking and reporting tools
- ✓ Helpdesk support

Experience matters. Make yours visible.

RESEARCH ANALYSIS

55%

SAY EXPERIENCE IS THE #1 QUALITY THEY VALUE MOST IN A FINANCIAL ADVISOR

SOLIDIFY YOUR BRAND WITH ADVISOR WEBSITES THAT CONVEY PROFESSIONALISM AND EXPERIENCE

Set up your website in minutes using our innovative templates. Customize your pages and content to reflect your personal brand, adding videos, calculators, newsletter articles, calendars and more.

- ✓ Enjoy white-glove setup service
- ✓ Configure to customized specs
- ✓ Include engaging content
- ✓ Make it mobile-friendly



■ Leverage existing relationships.

RESEARCH ANALYSIS

55%

OF MILLENNIALS SAY THEY WOULD CONSIDER THEIR FAMILY'S FINANCIAL ADVISOR

80%

HAVE NEVER MET THEIR FAMILY'S FINANCIAL ADVISOR

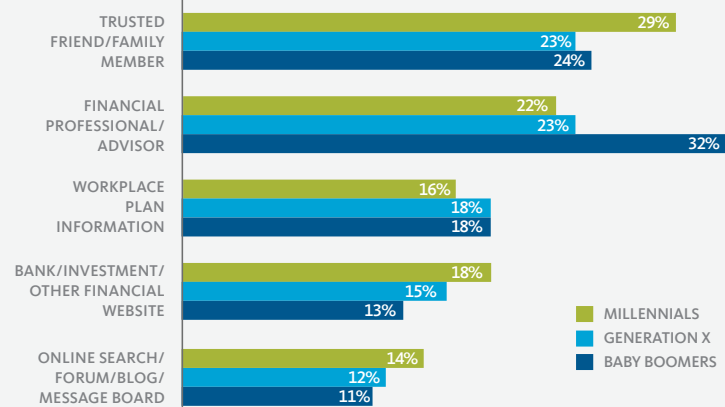
BUILD REFERRAL NETWORKS USING TURNKEY SEMINARS

Our robust library of thoughtful, FINRA-reviewed presentations includes seminars on a range of topics to help you deliver more value to your prospects and clients.

- ✓ Topical and relevant
- ✓ Dining events
- ✓ One-on-one
- ✓ Multi-session
- ✓ Customizable for any audience

RESEARCH ANALYSIS

Millennials are the only generation that looks for savings advice more from family and friends than financial advisors.



■ Provide meaningful insight and guidance.

RESEARCH ANALYSIS

Our research indicates a serious education gap for younger investors.

66%

ARE MORE CONFIDENT INVESTING IN A SAVINGS ACCOUNT THAN OTHER INVESTMENT CHOICES

58%

ARE CONFIDENT INVESTING IN A PRIVATE BUSINESS

TAP INTO AN INDUSTRY-LEADING EDUCATIONAL CONTENT LIBRARY

Become a true thought leader with our extensive library of original content. Easily share articles, videos, market summaries and e-seminar presentations that empower your clients with the information they need to make the best decisions.

- ✓ Easy-to-search library
- ✓ FINRA compliant
- ✓ Distribute across any device
- ✓ Multiple content formats

Broadridge delivers next-gen innovations to keep you ready for the next generation investor. Discover more ways to take advantage of unfolding opportunity.

Contact your Broadridge representative today: +1 (800) 233-2834

Ready for Next