

Start your customer's journey off right



ELEVATE YOUR DIGITAL PRESENCE

Match investors and advisors—and serve up relevant advisor information in a professional, compliant manner.



DRIVE MORE BUSINESS DIGITALLY

Convert more site visitors into clients by understanding what matters most.



INCREASE THE VALUE OF YOUR CORPORATE WEBSITE

Achieve greater impact when you begin each investor's journey with a personalized, customized experience.



PREPARE FOR WHAT'S NEXT

Utilize expanded analytics to better understand where website visitors are coming from, how they use the Locator and the website, and when they become leads.

Partner with Broadridge to build campaigns that amplify your brand and increase digital discoverability.

TURN WEB VISITS INTO OPPORTUNITIES

Investors increasingly seek out advisors online. Achieve a more focused advisor search experience when you integrate the Broadridge Locator into your corporate website. Or allow Broadridge to host the Locator for you. Either way, it's quick, simple and effective—with matching capabilities that do much more than simply serving up advisors nearby.

ZERO IN ON WHAT MATTERS

Whether an advisor is around the corner may matter less in today's digital world. Investors want to know that advisors can fulfill certain needs. The Broadridge Locator helps to enrich the investor journey and creates advisor profiles and presence online that can attract prospects.

OPTIMIZE YOUR LOCATOR EXPERIENCE

Now you can match investors to advisors by both location and need. Investors answer quick questions. Built-in logic narrows recommendations by criteria such as investment goals, advice needs, location preferences and more. Access to this instant self-service shortlist increases investor satisfaction—and the odds that site visitors become clients for your firm.

EASY INTEGRATION

Adding the Broadridge Locator to your website experience is easy. Whether you include the Locator in your initial install or decide to add it to your existing website experience, the Broadridge team is here to provide technical support. You can host—or have it hosted by Broadridge—it's your choice. Either way, your advisors gain added visibility.

FACTOR IN THE CRITERIA THAT COUNTS

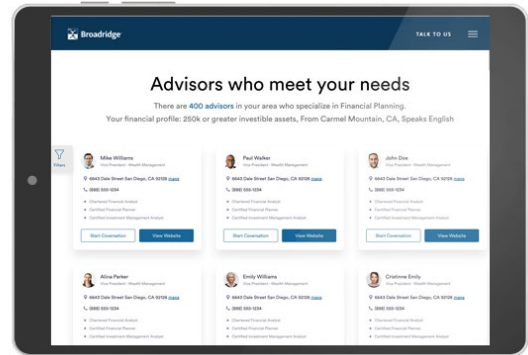
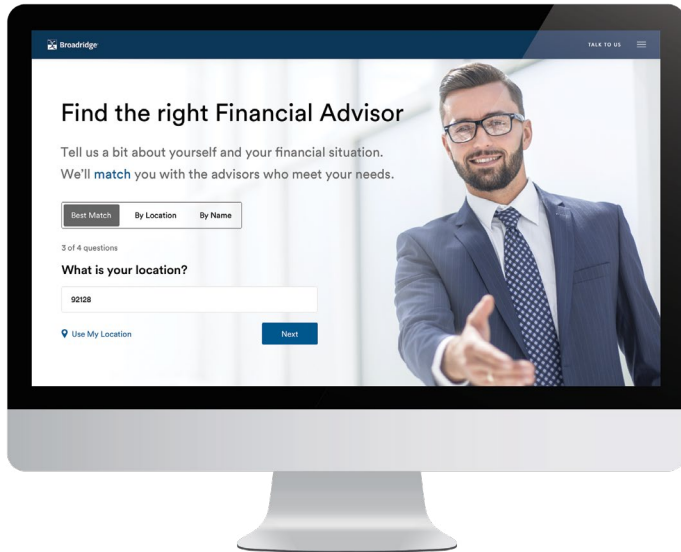
The Broadridge Locator questions create better matches between investors and advisors.

- Does the investor prefer English or another language?
- Do they prefer self-service or more interaction with a financial professional?
- Would they like to meet in person or virtually?
- Are they seeking advisors with certain specialties?
- Do they require advice on a specific situation or life goal?
- When a ZIP code is entered, does a geo-radius pull in results or is state registration leveraged?

Add the Broadridge Locator to your website to convert more visitors into leads.

OFFER AN INTERACTIVE INVESTOR-ADVISOR MATCHING EXPERIENCE.

Allow prospects to discover the right advisors through a simple menu-driven selection process.

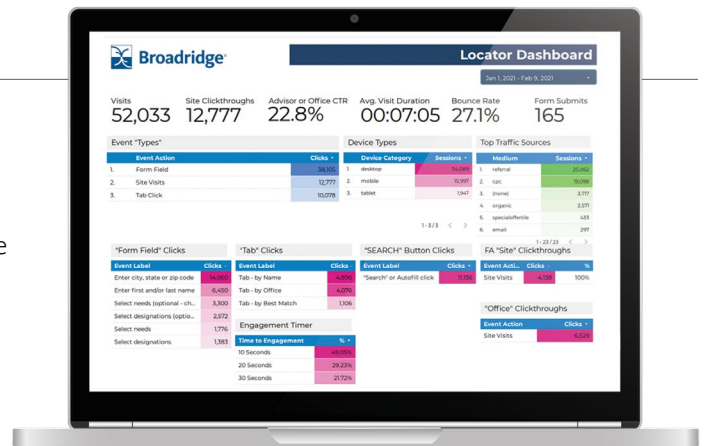


PROFILE ADVISORS IN A HIGHLY PROFESSIONAL, BRAND-COMPLIANT FORMAT.

Growth-focused advisors recognize the power of a digital presence. Offer them targeted exposure—no digital knowhow required. You'll strengthen your brand—and your ability to help advisors gain clients.

TAP INTO A WEALTH OF ANALYTICAL INSIGHT.

There's a lot you can learn from web traffic when you provide clients and prospects with an opportunity to interact with your site. Enrich your analytics with input from the Locator questions site visitors choose to answer—and how they answer them. You'll gain insight into what matters most and how to further amplify your web experience.



CONVERT MORE SITE VISITORS INTO CLIENTS.

Contact your Broadridge representative to learn how adding the Broadridge Locator to your website can help drive the right traffic to your advisors.

broadridge.com

Broadridge, a global Fintech leader with over \$4.5 billion in revenues, provides the critical infrastructure that powers investing, corporate governance and communications to enable better financial lives. We deliver technology-driven solutions that drive business transformation for our clients and help them get ahead of today's challenges to capitalize on what's next.

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