

# Simplify proxy voting from start to finish with ProxyEdge®

## VALUE AND EFFICIENCY AT YOUR FINGERTIPS

- Fast and easy automated account set up
- Convenient templates to add up to 2500 new custodial accounts at once
- Manage everything on a single sign-on platform

## EXECUTE WITH CONFIDENCE

Recent market shifts, including a focus on transparency, ESG and the increase in mobile-reliant remote workers, have uncovered gaps in the way proxy votes are managed and executed. Streamline your operations with ProxyEdge, our end-to-end electronic voting solution. ProxyEdge's automated account setup and fully integrated Proxy Policies and Insights® features add efficiencies to your operations and improve your overall experience.

## AUTOMATED ACCOUNT SETUP

Adding new custodial accounts is fast and easy. Simply submit account registration requests directly to your custodian through ProxyEdge.

Select a single account or use bulk templates to upload multiple accounts at once—up to 2500. The escalation feature minimizes delays. Requests with unchanged status after three business days can move to the front of the queue.

## OPTIMIZE SHARE RECALL

The Broadridge Share Management Solution, available through ProxyEdge, combines the power of lending and proxy data, so that you can achieve the dual objectives of complying with your ESG principles while delivering additional value to your clients. This solution gives the user the ability to see upcoming record dates of any public company as early as 3 weeks prior to being announced. Plus, maximize interest revenue and gain a consolidated view of all upcoming global and U.S. meetings.

## INTEGRATED PROXY POLICIES AND INSIGHTS

Access everything you need for due diligence and vote execution from the single sign-on ProxyEdge platform.

Get unmatched insight and analysis based on EDGAR-sourced historical data with Broadridge Proxy Policies and Insights. Identify and benchmark your policies against key industry trends with inputs from SEC DEF14A, 8-K and N-PX filings. Confidently meet your fund's ESG objectives with leading MSCI insight, efficiency, flexibility and control across every vote, every time.



## Integrated recommendations and customized reporting

Easily add third party research reports, Broadridge data-driven research, analytics and reporting, and much more, including direct access to subscription-based research reports and vote recommendations from industry experts. Instantly customize reports by proposal category (including detailed ESG categories) and date range via on-demand audit history, to keep proxy votes aligned with policy, instructions and management recommendations. Plus, use Broadridge ProxyDisclosure® to easily meet all SEC disclosure requirements.

PROVIDERS AND THEIR COVERAGE	
INTEGRATED PROVIDERS	MARKETS COVERED
Proxy, Policies and Insights (Shareholder Value Model)	Global coverage
Proxy, Policy and Insights (MSCI ESG Model)	Global coverage
Australian Council of Superannuation Investors Limited (ACSI)	Australia
DSW	Germany
Egan-Jones	Global
European Corporate Governance Service (ECGS)	Europe
Frontis Governance	Italy
Glass, Lewis & Co.	Global
Governance Visions	Japan
InGovern Research Services	India
Institutional Investor Advisory Services India Limited (IIAS)	India
Interfaith Council on Corporate Responsibility (ICCR)	United States
Nordic Investor Services	Sweden, Norway, Finland, Denmark
PIRC	United Kingdom
ProxInvest	France
Stakeholders Empowerment Services (SES)	India

## ProxyEdge® Service Tiers

Create and execute informed vote instructions using data-driven, customizable templates, third-party research and recommendations or your own policy guidelines. Flag key meetings, markets, accounts or proposals with advanced custom alerts. Easily add new custodial banks and brokers via automated account setup features.

MORE CHOICE. LESS EFFORT. GREATER VALUE.			
FEATURES	STANDARD	PREMIER	INTEGRATED RECOMMENDATION SERVICE
Paper Reduction	✓	✓	✓
Voting Views & Options	✓	✓	✓
Email Alerts	✓	✓	✓
Reporting	✓	✓	✓
Multiple User Access & Customization	✓	✓	✓
Advanced Voting Options		✓	✓
Policy Management		✓	✓
Advanced Standing Instructions		✓	✓
Record Keeping & Advanced Reporting		✓	✓
Custom Alerts		✓	✓
Vote Recommendations			✓
Research Reports			✓

Broadridge is not a proxy advisor and the ProxyEdge service will not include any Broadridge recommendation as to the manner in which a client should vote or the factors that a client should consider when voting on any issue, candidate or ballot proposition.

Get started today. Talk to an expert.

+1 855 252 3822 or visit [broadridge.com](https://broadridge.com)

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