

Experience an unparalleled enterprise data management and financial wellness solution

Broadridge Data Aggregation converts massive sets of disparate data into actionable insights for you and your customers.

Accelerate data management—from front to back office—with a single solution that delivers a holistic view of all client assets and liabilities. Broadridge Data Aggregation and Financial Reporting enables you to easily manage client portfolios, generate reports and provide complete, self-service personal financial management tools. Accuracy and efficiency are imperative.. Only Broadridge has the data governance experience to offer you a true competitive advantage.

INCREASE PRODUCTIVITY, GROWTH AND SECURITY

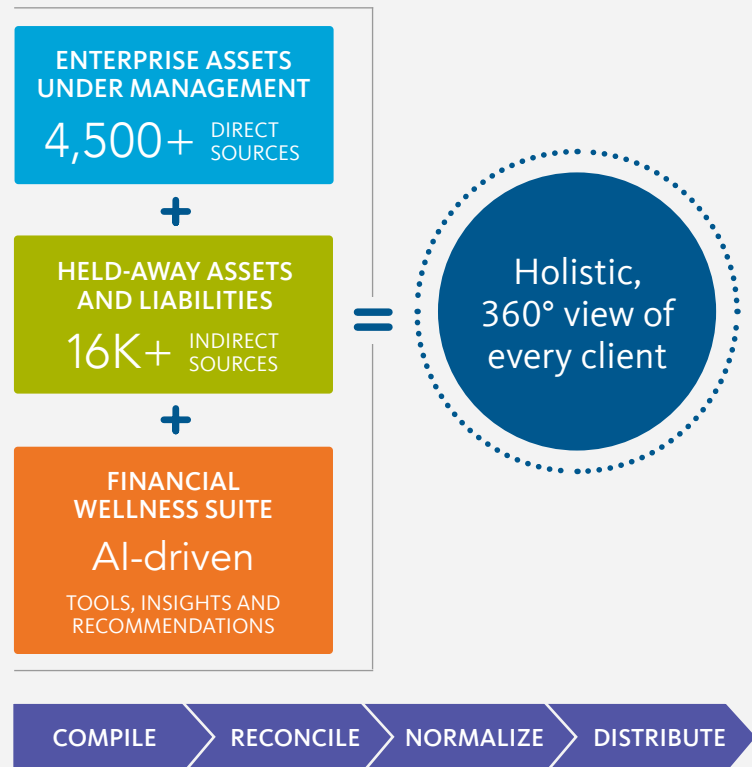
Gain a deeper understanding of the regulatory, privacy and fiduciary trends impacting your business. Broadridge Data Aggregation and Financial Reporting consistently provides complete, timely, reconciled and normalized data, enabling you to focus on higher-level business opportunities. Our solution delivers a 360-degree view of all customer assets and liabilities using direct feeds from custodians and client-approved access to their data at other financial institutions.

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| Discover new opportunities | Easily identify your next best action with multi-functional views including assets under management, cash balances and new accounts. |
| Deepen client relationships | Leverage client-authorized data aggregation for client assets and liabilities. Get performance reports and easily feed data to third-party applications. |
| Supervise your advisors more effectively | Streamline report generation across client groups or at any level in the advisor-firm hierarchy. |
| Ensure data security | Confidently maintain data quality and security standards with the only solution that delivers reconciled data every day. |
| Help advisors differentiate their practice | Provide clients with holistic advice and the digital tools to manage their budgeting and spending. |

Data and money management. Redefined.

Aggregate data enterprise wide across all investment and banking account types and products including:

Deposit and Investment Accounts | Loans and other Liabilities
Insurance and Annuity Products



Quality data provides smarter insights

Comprehensive financial advice begins with a holistic view of every client's assets and liabilities. Empower your advisors with the actionable information required to deliver more value—at every point of interaction.

Confidently evolve your performance capabilities with a single, complete data management solution to accelerate growth across your enterprise.



- Fully reconciled data
- Direct custodial feeds
- Centralized data repository
- Robust APIs
- Client assets and liabilities
- 360° client view including held-away assets and liabilities

Generate reports across client groups or at any level you require.

Access an extensive library of investment- and insurance-specific reports to acquire insights to help grow your business.

Track performance and identify opportunities for growth.

Equip your team with practice-management tools that maximize productivity.

Facilitate comprehensive analysis with intuitive dashboards.

Leverage expertise and insights gained by processing tens of millions of investment and insurance transactions every day for over two decades.

ALLOW CLIENTS TO UNLOCK THE POWER OF THEIR FINANCIAL DATA



BUDGETING



FINANCIAL WELLNESS



CASH FLOW



GOALS



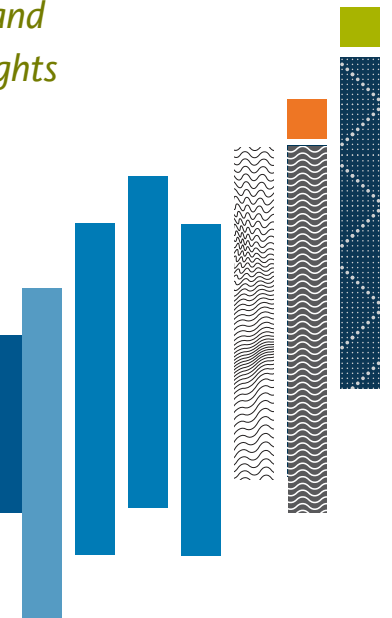
DEBT MANAGEMENT



OPPORTUNITIES

“Spend less time managing data and more time turning data into insights that drive business growth.”

– MICHAEL ALEXANDER
PRESIDENT, WEALTH MANAGEMENT
BROADRIDGE



Empower your advisors to deliver more value with Data Aggregation and Financial Reporting from Broadridge.

Learn more at broadridge.com/dataaggregation