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

An untapped market presents unprecedented opportunity.

Meet millennials where they are, on their terms.

**RESEARCH ANALYSIS**

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

<table>
<thead>
<tr>
<th>Communication Method</th>
<th>Millennials</th>
<th>Generation X</th>
<th>Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-person</td>
<td>77%</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>Phone call</td>
<td>45%</td>
<td>49%</td>
<td>43%</td>
</tr>
<tr>
<td>Email</td>
<td>42%</td>
<td>33%</td>
<td>27%</td>
</tr>
<tr>
<td>Text</td>
<td>12%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>Video chat</td>
<td>15%</td>
<td>17%</td>
<td>25%</td>
</tr>
<tr>
<td>Social media</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

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

**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.

**Change perceptions. Make connections.**

**Research Analysis**

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

<table>
<thead>
<tr>
<th>Source of Savings Advice</th>
<th>Millennials</th>
<th>Generation X</th>
<th>Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friend/Family Member</td>
<td>29%</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>Financial Professional/Advisor</td>
<td>22%</td>
<td>23%</td>
<td>18%</td>
</tr>
<tr>
<td>Workplace Plan Information</td>
<td>16%</td>
<td>35%</td>
<td>18%</td>
</tr>
<tr>
<td>Bank/Investment/Other Financial Website</td>
<td>13%</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>Online Search/Forum/Blog/Message Board</td>
<td>12%</td>
<td>24%</td>
<td>11%</td>
</tr>
</tbody>
</table>

- **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

**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**