



Introducing **The New Client Access!**

Broadridge Data Aggregation is excited and proud to announce the launch of our new Client Access experience coming May 17th!

We've redesigned the site with your clients in mind. The information is presented more clearly, more visually, and in a tablet-friendly responsive design.

Best of all, this update requires no work or configuration on the part of the Advisor – Clients logging in after the release will simply experience the new site.

THE CLIENT ACCESS SITE HAS BEEN COMPLETELY REDESIGNED TO PRESENT INFORMATION MORE CLEARLY, MORE VISUALLY, AND IN A TABLET-FRIENDLY RESPONSIVE DESIGN.

Consolidated View

Your clients will be able to view their assets, benefits, reports, files, etc.

Change in Value

Clients will be able to view the change in value over time for up to five (5) years for their accounts and portfolios

Personalized Welcome Message

Suitable for all categories business and personal presentation



Insurance Data*

Your clients will be able to view both assets AND benefits when the DTCC-IPS insurance data is available

Notifications

Clients will be notified at login when new reports or files are able to view and/or download

*Requires DTCC-IPS carrier data

INTERACTIVE CLIENT REVIEWS



Advisors will be able to use the Client Access view as an in-depth, interactive client review presentation tool.