



Broadridge's Forefield Signs an Agreement with CUNA Brokerage Services

LAKE SUCCESS, N.Y., July 6, 2011 – Broadridge Financial Solutions, Inc. (NYSE:BR) announced today that its Forefield division has signed a five-year agreement with CUNA Brokerage Services™ to provide a suite of web-based education and marketing solutions for their 600 financial advisors.

CUNA Brokerage Services will utilize three of Forefield's web-based applications:

- **Forefield Advisor™**: a sales, education, and client communication tool that enables financial advisors to deliver current, concise and compliant resources to their clients. Forefield Advisor provides access to more than 3,000 resources made up of more than 2,300 articles, 200 illustrations and tables, 200 interactive calculators, and more than 400 presentations.
- **Forefield Seminars**: comprehensive, customizable, FINRA-reviewed presentations for use by individual advisors and enterprises. Each seminar is 30-45 minutes in duration, comprised of 20-30 PowerPoint slides, a complete script, and an interactive client workbook.
- **Forefield Continuing Education (CE)**: an online continuing education service where advisors can earn the credits necessary to satisfy their CE requirements for many popular accreditations, including CFP®, ChFC®, CLF®, CLU®, RHU®, and REBC®. Forefield's online interface tracks the date that an advisor successfully completes a test and automatically notifies the CFP Board of Standards, assuring the advisor's credits will be included in the Continuing Education Reporting Form.

"Forefield's focus on providing exemplary service to the advisor and their commitment to producing both timely and accessible content make us a perfect fit for CUNA Brokerage Services," said Andrew Besheer, Vice President, Customer Communications, Broadridge. "This agreement represents an exciting and significant client win that further validates the advisor communication strategy that led Broadridge to acquire Forefield last December. We look forward to building a strong working relationship with CUNA Brokerage Services in the future," continued Mr. Besheer.

"In our search for a provider of education and marketing solutions, we were seeking to partner with a company which not only had an industry leading reputation, but an expansive suite of services and competitive pricing," said Mark Warshauer, Vice President, Marketing, CUNA Brokerage Services. "Broadridge, and its Forefield division, exemplify a company that has a commitment to ensuring clients receive customized solutions to meet their needs and increase revenues."

The suite of services went live for advisors at CUNA Brokerage Services on June 1st.

About Broadridge

Broadridge (NYSE:BR) is a technology services company focused on global capital markets. Broadridge is the market leader enabling secure and accurate processing of information for communications and securities transactions among issuers, investors and financial intermediaries. Broadridge builds the infrastructure that underpins proxy services for over 90% of public companies and mutual funds in North America; processes more than \$3 trillion in fixed-income and equity trades per day; and saves companies billions annually through its technology solutions. For more information about Broadridge, please visit www.broadridge.com.

About CUNA Brokerage Services

CUNA Brokerage Services, Inc. provides Broker Dealer services to nearly 400 credit unions nationwide, offering a full range of investment products, variable insurance products, securities program and professional services related to securities transactions.

Financial Advisors registered with CUNA Brokerage Services work one on one with credit union members to help them outline, and meet, their retirement, investment and insurance needs. Working on-site at the credit union, they provide comprehensive financial services ranging from simple transactions to complex financial planning and wealth management services.

CUNA Mutual Group is a leading provider of financial services to cooperatives, credit unions and their members and valued customers worldwide. With more than 70 years of market commitment, CUNA Mutual's vision is unwavering: to be a trusted business partner who delivers service excellence and customer-focused, best-in-class products and market-driven innovation. More information on the company is available on the company's Web site at www.cunamutual.com.

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