



Broadridge®

Geneos Wealth Management Selects Broadridge's Investigo® Data Model
Leading Broker-Dealer Upgrades to Advanced Data Aggregation Platform

Lake Success, New York – November 16, 2009 –Broadridge Financial Solutions, Inc. (NYSE:BR) today announced that Geneos Wealth Management has replaced its legacy data model with Broadridge's Investigo Data Model (IDM). Broadridge's IDM is a web-based wealth management platform that consolidates client account data from various sources, then updates and reconciles it automatically to ensure data integrity.

Broadridge's IDM provides sophisticated enterprise-wide data consolidation, to enable financial advisors to quickly and easily analyze their customers' comprehensive portfolio data, including held-away positions, and make more informed and accurate investment strategy decisions.

Geneos Wealth Management, a leading broker-dealer providing financial and estate-planning services through a select network of registered representatives, will deploy Broadridge's IDM to integrate a broad range of functions across its enterprise, including portfolio management, data aggregation, reporting, customer relationship management (CRM), regulatory compliance and online document management.

"Our prior data model proved insufficient in meeting our expanding business needs. Throughout our evaluation process, Broadridge's Investigo was the clear choice," said Dean Rager, Senior Vice President for Geneos Wealth Management. "The status quo was no longer acceptable for us. We needed a superior, agnostic database technology that could seamlessly integrate with our current technology platform. With Broadridge's Investigo Data Model we now have current, accurate, usable information at our fingertips enabling us to make better, more well-informed decisions faster," continued Mr. Rager.

When collecting client data from various sources, the integrity of that data will understandably be questioned. "Investigo satisfies Geneos' appetite for current, usable, and reliable client data so their advisors can make better decisions for their customers," said Kevin Normoyle, Senior Vice President and General Manager, Securities Processing Solutions-US, Broadridge. "Broadridge's Investigo Data Model provides broker-dealers with the peace of mind knowing that their consolidated data is comprehensive, accurate and backed by Broadridge's heritage of service and support. Data quality is the key. Poor data quality costs financial organizations vast amounts of money and may lead to poor decisions and inferior customer relationship management. Broadridge is dedicated to providing their clients with clean, ready to use, accurate data," continued Mr. Normoyle.

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About Broadridge

Broadridge Financial Solutions, Inc., with over \$2.1 billion in revenues in fiscal year 2009 and more than 40 years of experience, is a leading global provider of technology-based solutions to the financial services industry. Our systems and services include investor communication, securities processing, and clearing and outsourcing solutions. We offer advanced, integrated systems and services that are dependable, scalable and cost-efficient. Our systems help reduce the need for clients to make significant capital investments in operations infrastructure, thereby allowing them to increase their focus on core business activities. For more information about Broadridge, please visit www.broadridge.com.

About Geneos Wealth Management

Geneos is a leading broker/dealer headquartered in Denver, CO, providing financial and estate-planning services through a select network of registered representatives. The firm's 260 high-quality advisors around the nation represent \$7 billion in client assets under management. Geneos advisors offer a complete array of wealth management products, including mutual funds, alternative investment options, fixed and variable annuities, and life insurance company products. www.geneoswealth.com.

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