



Broadridge's Access Data Delivers Unprecedented Analytics and Insight to Mutual Funds via Schwab Asset Intelligence™

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LAKE SUCCESS, N.Y., Dec. 13, 2012 /PRNewswire/ -- Access Data, a [Broadridge Financial Solutions](#) (NYSE: BR) company and leader in enterprise data management, analysis and reporting for the financial services industry, and Charles Schwab (NYSE: SCHW) have launched Schwab Asset Intelligence, a portal providing mutual funds with unprecedented access to fund asset and sales information across Schwab's RIA, retail, retirement and trust channels.

(Logo: <http://photos.prnewswire.com/prmh/20110920/MM71626LOGO>)

This collaboration between two financial services leaders utilizes cutting edge analytics and insightful reporting to benefit the mutual fund industry. Through its unique offering, the portal goes beyond standard data delivery to help funds understand how assets are generated and which advisors are driving the most sales, providing reliable intelligence to drive business.

"Broadridge's proprietary technology and services solve a growing problem in the financial industry – the lack of timely data transparency and insight. With this partnership and portal, and by leveraging the experience of Access Data, we're creating a level of visibility that hasn't previously existed by simplifying the exchange of information between mutual fund families and distributors. In essence, eligible mutual fund providers will be able to harness the power of big data to uncover new business opportunities and drive growth," said Doug Hanson, Vice President overseeing third party mutual fund platforms at Charles Schwab.

"With advanced analytics and insightful reporting, Schwab's mutual fund providers will have access to fund asset and flow information that they didn't have before. This new level of information will help them better understand their market share, how they rank against other funds, and where they're gaining more traction and adding new clients – enabling partners to ultimately raise more assets under management. In short, we're providing a gateway that will redefine the industry and transform data into valuable insight to help drive more business," said Dan Cwenar, President, Access Data.

Powered by Access Data, Schwab Asset Intelligence provides fund companies with Assets and Flows reports that present fund asset, trading and sales information across RIA, retail, retirement and trust channels on a daily, weekly and monthly basis. In addition, Premium Reporting is available for an additional fee and offers mutual funds even more visibility into how assets are generated, the advisors driving sales, and their competitive position.

[Access Data/Broadridge's SalesVision](#) web-based, data management solutions aggregate, integrate and consolidate mutual fund and ETF data to help firms uncover hidden business opportunities and simplify revenue and business processes, while ensuring data transparency so critical for regulatory compliance. Moreover, additional SalesVision modules are available that provide quicker access to timely information and market intelligence to gain insight on product positions, identify asset flow changes by line of business, and more comprehensive, advanced analysis and reporting across all distribution channels.

About Access Data

Access Data Corp., a Broadridge Company, is a leader in enterprise data management, analysis and reporting for the financial services industry - providing data and reporting solutions covering 90% of all long term fund assets and 95 percent of all ETF assets. Leading asset management firms and financial intermediaries utilize Access Data's proprietary technology and services to gain visibility into how sales and assets are generated and address a myriad of challenges in distribution, compensation management and compliance and risk management. Access Data's flagship product, Access Data SalesVision® provides comprehensive storage and analysis solutions, delivering web-based reporting as Software as a Service. Please visit, broadridge.com/accessdata

About Broadridge

Broadridge 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 \$4.5 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.

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