

# Broadridge brand guidelines

# About these guidelines

We bring our brand to life with the internal and external materials we create, and it's with this brand we market our world-class portfolio of technology and services, build awareness and understanding of what we do and why it matters, and ultimately drive consideration and trust in Broadridge.

Consistency is the key to expressing a strong, cohesive and memorable brand. These guidelines provide the direction for marketers, designers, agency partners, and anyone who brings our brand to life to properly portray and implement the Broadridge brand.

Your commitment to thoughtfully using this direction will help ensure the communications and experiences we provide to our clients, prospects, and current and future associates portray a strong, modern, unified Broadridge.

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# Brand overview

**Be ready to seize market opportunity**

Trusted expertise and transformative technology to manage the complexity of global investing, governance, and investor communications.

**Broadridge** Ready for Next

**Be ready for the future of financial services**

Trusted expertise. Transformative technology.

2022 ANNUAL REPORT

Modular technology puts you in control.

Click for Sound

**Experience the future of wealth management**

Unlock growth with the Broadridge Wealth Platform.

Schedule a demo

**ASSET MANAGEMENT**

**Marketing update**

**Simplifying and Innovating Trading**

**Powering the transformation of financial services**

**Broadridge**

Danielle Gurrieri  
Head of Product Management, Bank, Broker, Dealer

**The 10 key dimensions of digital transformation leadership**

- Innovation culture
- Digital skills and talent
- Digital customer experiences
- Data security and privacy
- Digital regulatory compliance
- Agile software deployment
- Automation tools
- Data management
- Modernized core IT
- Harnessing emerging technologies

**Custom chart area**

Chart drop shadow (light slides only)

This chart example has a drop shadow applied to the placeholder with the following settings:

- Transparency: 75%
- Size: 100%
- Blur: 45 pts
- Angle: 45 deg.
- Distance: 8 pts

Set criteria for fund evaluation

Use charts configured to your requirements to further refine analyses and better understand rankings. Analyze performance by time period and risk metrics.

**The state of digital transformation in 2024**

Insights from 500 senior executives across the financial services ecosystem reveal the momentum, challenges, and opportunities of next-gen technologies.

Explore our annual study →

**Unleashing AI**

Although GenAI has been capturing the headlines lately, financial firms have been harnessing AI for years.

More than 95% of firms surveyed are investing in AI, with top investment priorities in client-facing front office functions such as customer interaction and research, as well as the data management systems to support those activities and the risk, fraud, and data security to protect them.



A MESSAGE FROM

**Maura Creekmore**  
Chief Administrative Officer, Enterprise Account Management

**Broadridge customer communications quarterly review**

Optional subtitle

MMMM DD, YYYY

Presenter Name (L1)  
Company Name (L2)

**Be ready for next**

- 5000+
- 10T
- 95%

More than 5,000 investors rely on us to deliver essential communications to their clients, creating richer customer experiences.

Financial firms rely on us to process daily trading of more than U.S. \$3 trillion in equities, fixed income and other securities globally.

Clients look to us to provide visibility into the distribution of 90% of all ETF assets and 90% of all long-term mutual fund assets.

**The service value chain**

Every financial institution relies on good data. However not every institution is aware of the total effort necessary to procure it. An effective strategy to manage reference data will:

- Create anomalous ripple effects across the organization
- Create cost savings and consistency in the creation and maintenance of the data
- Incremental data improvements can support vast reductions in organizational costs

**SEB Implements Broadridge's International Post-Trade Processing Solution**

**Broadridge**

**Contents**

- Momentum driven market
- Customer obsession
- Unleashing AI
- Color palette
- People-powered innovation
- The transformation roadmap

**Be ready for what the market demands next**

Investment solutions

**Featured solutions**

- Asset Servicing
- Connectivity
- Market Intelligence
- Proxy Services

**Powering the pulse of the financial industry**

Our global, multi-asset class solutions power the pulse of global trading and operations. We deliver high-performance and seamless investor experiences.

Capital Markets

**Our capabilities**

- Investment Solutions
- Trade Execution Solutions
- Middle & Back Office Solutions
- Business & Regulatory Compliance
- Customer Communication
- Data, Analytics, & Intelligence
- Consulting
- Wealth Advisor Solutions

**Recognized by the industry**

**Insights & Perspectives**

## BROADRIDGE BRAND GUIDELINES

# 1.0 Brand strategy

- 1.1 What a brand is
- 1.2 Our brand framework
- 1.3 Our essence
- 1.4 Our value proposition
- 1.5 Pillars of differentiation
- 1.6 Our personality
- 1.7 Culture and values

## What a brand is

A brand is more than just a logo; it's the sum total of all products, symbols, and experiences that form someone's impression of a company. A brand is critical because it sets expectations for how we, our associates, and our products and services will behave. These expectations shape decision-making and drive demand.

# Our brand framework

A summary to remember our brand strategy.

<b>Our essence</b>	We play a mission-critical role in the financial services industry as a trusted and transformative leader.
<b>Our value proposition</b>	Broadridge is a global technology leader with the trusted expertise and transformative technology to help our clients and the financial services industry operate, innovate, and grow.
<b>Our tagline</b>	Ready for Next
<b>Our pillars of differentiation</b>	Unmatched stability and scale, unique vantage point, client-centered innovation
<b>How we show up</b>	Sophisticated simplicity, purposeful momentum, warm intelligence
<b>Our values</b>	Client-centric, respectful, engaged, accountable, trustworthy, entrepreneurial

## Our essence

The heart and soul of our company.

We play a mission-critical role in the financial services industry as a **trusted** and **transformative** leader.

**Trusted** is a reflection of our longstanding heritage that recognizes our expertise and proven track record of supporting and delivering complex, mission-critical functions.

**Transformative** speaks to impact on the digitization of the industry, helping clients to adapt, modernize, and pave a new path for the future.

# Our value proposition

Broadridge is a global technology leader with the trusted expertise and transformative technology to help our clients and the financial services industry **operate, innovate, and grow.**

**Operate** speaks to the critical technology and services we provide our clients to run their businesses.

We enable clients to **innovate** by helping them anticipate what's next and providing the technology to get there.

Everything Broadridge does for its clients serves the ultimate goal of helping them **grow** their businesses and better serve their customers.

# Pillars of differentiation

These three pillars set us apart in how and what we deliver.

## Unmatched stability and scale

We are the trusted people and platforms that our clients have relied on for over six decades. We play a central role across the financial services industry, and, because of that, we operate on a larger global scale than most others.

## Unique vantage point

We work across the entire financial ecosystem, from investing and trading to communications and governance. This unique business model gives us access to deep market data, insight, and intelligence which in turn enables us to support and serve our clients better than anyone else.

## Client-centered innovation

We take a rigorous and intentional approach to innovation that is based on the strategic needs of our clients. Our application of advanced technology is always closely tied to what our clients need to achieve tangible results.

# How we show up

A unique mix of attributes reflects how we show up for our clients and our colleagues every day.

## Sophisticated simplicity

We speak in a manner that is clear, concise, and direct, displaying a deep understanding of the challenges and complexities our clients face with actionable solutions.

## Unique vantage point

We engage our clients and each other with a forward-looking view, collectively paving the path for our future and our clients' future.

## Client-centered innovation

We act with knowledge and confidence while being thoughtful and inclusive. We build trust with each other and our clients through empathy and honesty.

# Culture and values

The guiding principles that define how we behave as individuals and as a company.

## Who we are defines how we move forward

Centered on our purpose, our promise to our clients, our philosophy of the Service-Profit Chain, and our values, our culture encompasses the actions and behavioral choices we make to drive Broadridge forward. This culture enables us to attract and retain top talent, drive innovation, and deliver exceptional outcomes for our clients.

Our values – Client-Centric, Respectful, Engaged, Accountable, Trustworthy, and Entrepreneurial – guide us in how we make decisions, how we interact with our clients, and how we work together as a team. These values enable us to CREATE—create great impact for our clients, create great results for our shareholders, and create a great workplace for our associates.

C

### Client-Centric

We empower clients  
We address complex challenges

R

### Respectful

We foster respect and inclusivity  
We support flexibility and balance

E

### Engaged

We encourage collaboration  
We promote continuous learning

A

### Accountable

We hold ourselves accountable  
We deliver value for shareholders

T

### Trustworthy

We lead with ethics and integrity  
We promote transparency

E

### Entrepreneurial

We encourage innovation  
We embrace change

## BROADRIDGE BRAND GUIDELINES

# 2.0 Brand experience

- 2.1 Defining our brand experience
- 2.2 Emotional intent
- 2.3 Our essence
- 2.4 Experience principles

# Defining our brand experience

The guiding ideas that define how we show up.

Brand experience is the overall perception anyone can have when interacting with a company at any point in their relationship with the company.

Defining Broadridge's brand experience helps us deliver a consistent, cohesive, and coherent experience across all physical and digital scenarios, from in-person events and office interiors to websites, social media, and webinars.

## Who will use it?

Our brand experience is a tool for bringing our brand to life. Whether you're creating physical or digital projects, our experience strategy is a starting point at kick-off and a north star throughout, rooting creative work in the tenets of our brand.

Tagline/emotional intent

Ready for Next

Our essence

Trusted & Transformative

Principles

Sophisticated  
simplicity

Purposeful  
momentum

Warm  
intelligence

## Tagline/emotional intent

The feeling we want you take away from every interaction.



# Ready for Next

*“We help clients get ahead of today’s challenges so they can capitalize on what’s next.”*

Ready for Next isn't about us, it's about putting our clients first, and helping them capitalize on what's next.

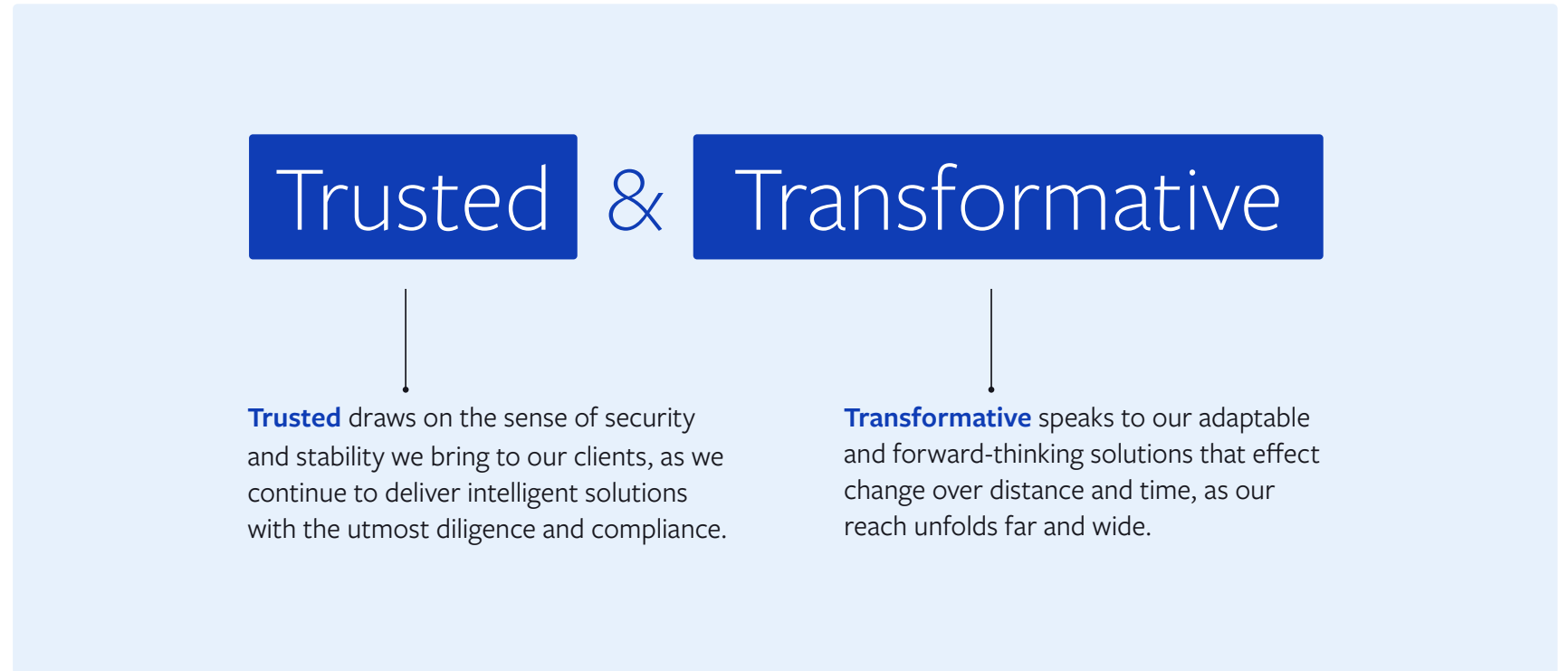
It reminds us that we are ready to meet whatever the market forces demand. We empower our clients with the insights and solutions they need to be confident in making bigger decisions that will ensure their success.

# Our essence

The overarching concept that drives all of our work.

To achieve the emotional intent of Ready for Next, we look to our essence, Trusted and Transformative. Our foundational experience, track record, and deep relationships are what enable Broadridge to innovate with conviction and confidence.

Whatever we create, we should feel invited to return to Trusted and Transformative to inspire our work.



# Experience principles

The criteria we use to create and evaluate experiences that balance trust and transformation.

A unique mix of attributes reflects how we show up for our clients and our colleagues every day.

See “How we show up” on page 14 for a foundational understanding of what this means to our brand.

## Sophisticated simplicity

At Broadridge, we ensure that moving forwards feels purposeful. We achieve this through design elements that reflect considered agility, forward-thinking solutions and a sense of stability.

- Establish clarity by following thoughtful, adaptable grids to structure content
- Earn trust with bold, confident layouts – but refraining from being brash or too loud
- Ease digital experiences through a singular focus on key content, avoiding overwhelm
- Create a feeling of reliability in our spaces through materials which convey solidity

## Purposeful momentum

At Broadridge, we help companies gain confidence and prepare for an unpredictable future. We represent this through design elements that imply intellectual sophistication and clear organization.

- Emphasize focus by anchoring design choices with purpose, oration for the sake of style
- Foster a feeling of movement with clean and focused gestures in furniture and spatial elements
- Establish a sense of gradual transformation through the use of color gradients and tonal variation
- Continue a feeling of momentum with flexible, modular systems in everything from furniture, to multi-purpose use of physical spaces, to graphics

## Warm intelligence

At Broadridge, we put people at the center of everything we do. We represent this through design elements that bring an empathetic, hands-on approachability to expertise, insights and data.

- Suggest approachability and ease through subtly rounded corners
- Enable easier understanding with bold headlines and signposting
- Create a feeling of warmth through our choice of materiality within our spaces
- Engage through sound which creates the sense of a journey, balancing electronic notes with subtle rhythm

## BROADRIDGE BRAND GUIDELINES

# 3.0 Visual expression

### **3.1 Elements**

- 3.1.1 Logo
- 3.1.2 Tagline
- 3.1.3 Colors
- 3.1.4 Fonts
- 3.1.5 Supergraphic
- 3.1.6 Photography

### **3.2 Components**

- 3.2.1 Iconography
- 3.2.2 Illustration
- 3.2.3 Data visualization
- 3.2.4 Grid system

### **3.3 Channels**

- 3.3.1 Email
- 3.3.2 Presentations
- 3.3.3 Events
- 3.3.4 Web
- 3.3.5 Social
- 3.3.6 Collateral
- 3.3.7 Stationery
- 3.3.8 Motion

# Our logo

Our logo sits at the heart of our brand and is the most recognizable part of our visual identity.

The Broadridge logo consists of our name and our symbol. Individually they have meaning and purpose. Together they identify our business, set an expectation for our brand, and allow us to put our mark on the world.

## **Our symbol**

We see the symbol in the logo as two arrows pointing to each other, focusing on achieving a common goal. It is a representation of the partnership Broadridge will have with our clients, associates, and business partners to deliver the right solutions and a consistent, reliable, best in class experience.



# Broadridge®

### **Getting started**

Visit [Our Brand](#) to download these and other files key to building our brand.

# Logo anatomy

Our logo is composed of two essential elements: the symbol and the namestyle.

These elements are in a fixed relationship to one another and should not be altered, modified or repositioned in any way. For reproduction purposes, always use the supplied logo files.

Do not use the symbol or the namestyle as an independent graphic. Both elements should always appear together in the approved logo lockup. The only exception is when the icon alone is used as a social media avatar.

## Third-party usage

All third-party logo usage requests must be approved by Broadridge. Please fill out and submit our [request form](#) to use our logo. For more information, please contact [BrandInfo@Broadridge.com](mailto:BrandInfo@Broadridge.com).



# Logo restrictions

When using our logo, it's important to account for the following restrictions.

## Clear space

When applying our logo, ensure that it has adequate space around it. This buffer zone helps to prevent the logo from being visually connected or paired with other messages, logos, or branding elements.

## Minimum size

Always reproduce the logo at sizes that ensure it remains recognizable. For notably small sizes, its reproduction should be done under careful supervision to ensure that the logo retains its shape and form.

## Trademark

Our logo is a registered trademark, so it is strongly recommended that registered trademark symbol (R) accompany the logo whenever it is used. This consistent usage reinforces our ownership and helps prevent unauthorized use.



## Minimum size

Minimum logo size  
3/16" or .1875 inches



## Trademark



# Logo colors

## Broadridge Blue logo

The Broadridge Blue logo is the primary version of our logo and should be used for most applications including print and PDFs. This version of our logo should always appear on a white or light background.

**Primary**  
Broadridge Blue logo



## White 'Knock Out' logo

The white 'knock out' version may be used as an alternative for these specific applications: digital, event signage and promotional items. This version of our logo may be used against Broadridge Blue or photography. When placing the logo on photography, be mindful of proper readability.

**Secondary**  
White 'Knock Out' logo



## Single-color black logo

The single color, black logo is restricted to single color, black reproduction such as newsprint or apparel.

**Restricted**  
Single-color black logo



# Logo background control

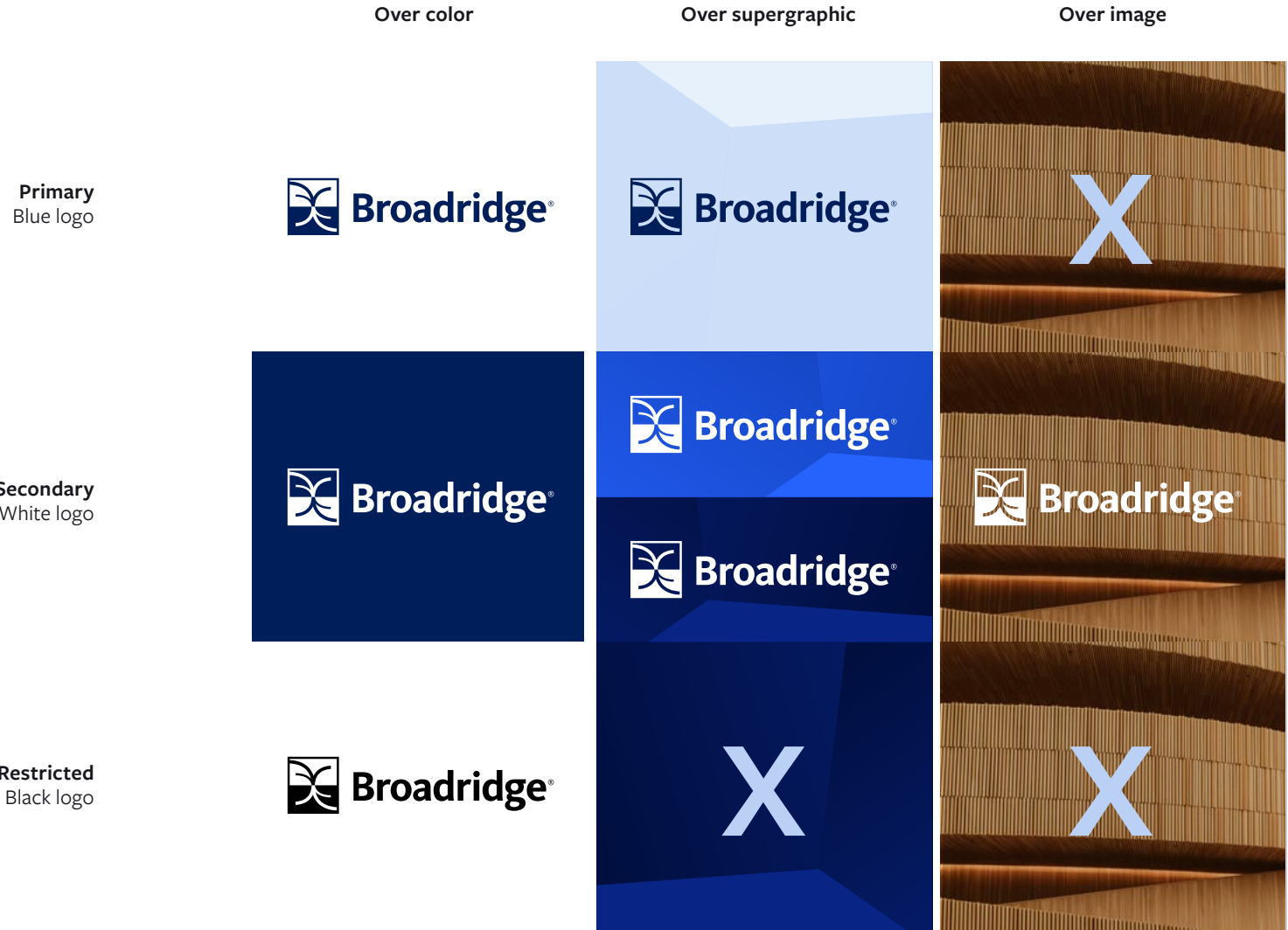
## Color backgrounds

When placing our logo on white or light backgrounds, including the light supergraphic, always use the logo in its full-color form—in Broadridge Blue. This ensures that the logo maintains its vibrancy and stands out clearly. On dark, black, or the Bright and Dark supergraphic backgrounds, the logo should be rendered in white for optimal visibility and contrast.

## Black and white

In situations where color printing is not available or does not complement the surrounding space, the logo may be reproduced in black or white.

This flexibility allows the logo to adapt to various contexts while still preserving its visual integrity and recognizability.



# Logo placement

## Primary placement

Our logo is positioned on the upper left of communications. This optimal placement ensures that our logo is one of the first elements the audience sees, effectively anchoring our brand presence in the overall design.

Typically, our logo should align with the margins of any document layout. In absence of well-defined margins, allow at the least the height of the symbol to define the space between our logo and the edge of any communication.

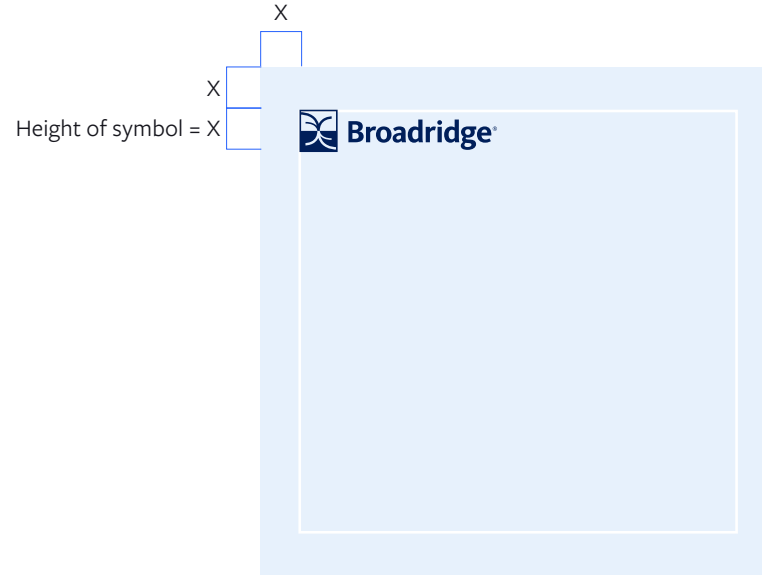
## Secondary placement

Certain situations, such as advertising, call for greater emphasis on a headline or graphic element within a layout. In those situations we allow for our logo to be placed at the bottom left of the communication.

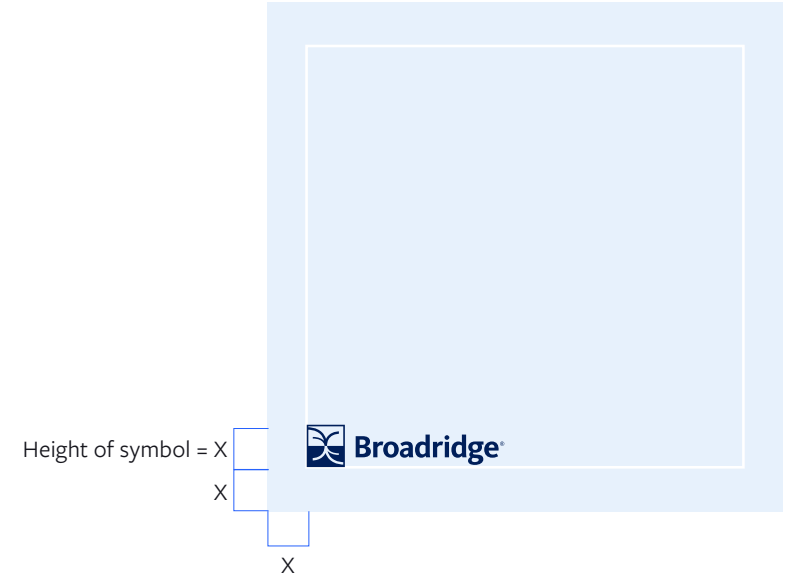
## Special situations

For certain scenarios, such as end cards for video or animation, it may be more appropriate to center our logo. For these special situations, check with brand for approval.

### Primary placement



### Secondary placement



### Special situations



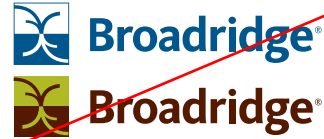
# Logo misuse

It's crucial to avoid common pitfalls to maintain brand integrity. For instance, always avoid:

1. Using legacy logos
2. Reproducing the logo in colors other than our primary blue, black, or white
3. Changing or distorting its proportions
4. Using the symbol or namestyle on its own
5. Reproducing on an angle or vertical manner
6. Adding a drop shadow or visual effects
7. Placing the logo within a holding shape or over an image
8. Scaling the logo too small
9. Rearranging logo elements
10. Or simply reproducing in low resolution

To ensure the logo consistently represents the brand, always use the provided artwork without making any modifications.

1. Incorrect logo version



2. Incorrect logo color



3. Logo proportions are distorted



4a. Logo is missing symbol



4b. Logo is missing namestyle



5. Logo is on an angle



6a. Logo has a drop shadow applied



6b. Logo has a drop shadow applied



7. Logo is place in a container



8. Logo is too small



9. Logo elements are rearranged



10. Logo is low resolution



# Our tagline

A simple, unifying, repeatable statement that reinforces our value to our clients.

Our brand tagline is also the emotional intent behind the creative direction. This is how we want people to feel during every interaction with our brand.

By encapsulating the spirit of Broadridge into one phrase, we create a possibility of uniting internal and external designers, associates across all teams, and Broadridge's clients around one distinctive emotion.

A large graphic consisting of a dark blue background with a lighter blue geometric shape at the bottom. The tagline "Ready for Next" is centered in white, sans-serif font.

# Ready for Next

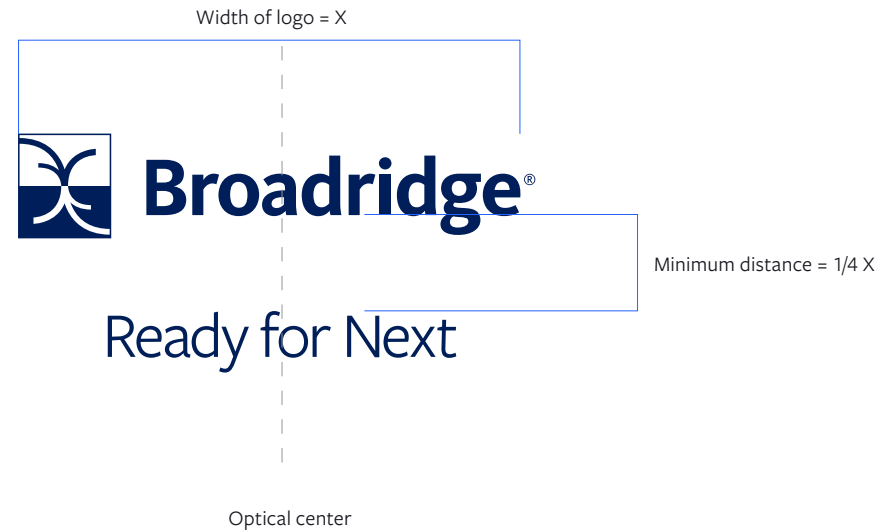
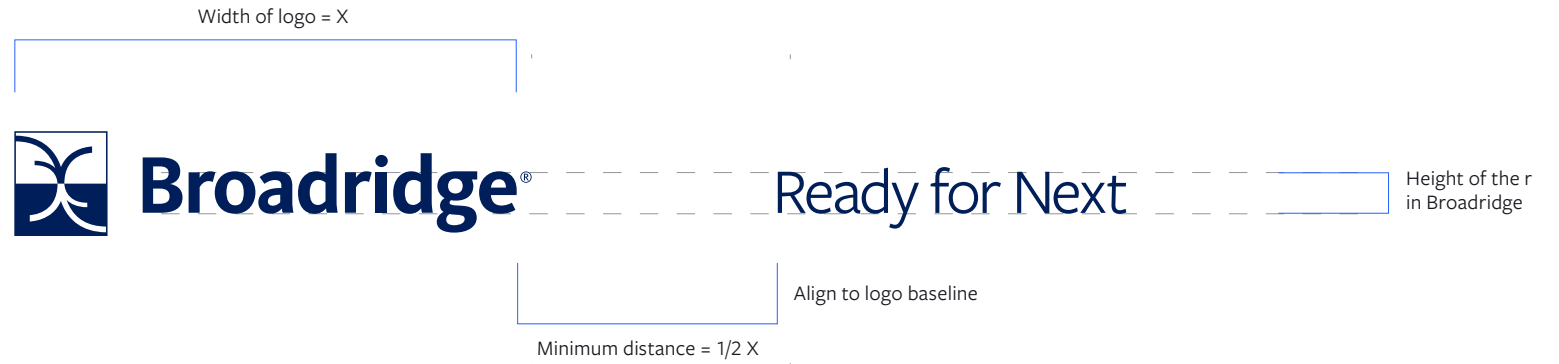
## Getting started

Visit [Our Brand](#) to download these and other files key to building our brand.

# Tagline sizing and placement

When using our tagline, it's essential to follow a few key guidelines to ensure consistency and effectiveness. It should:

- Sized according to our logo
- Appear below or to the right of the Broadridge logo
- Match the color of the Broadridge logo in either Broadridge Primary Blue or white ONLY
- Be easily legible, be mindful when placing the tagline on photography
- Not be altered, modified or repositioned in any way



# Tagline restrictions

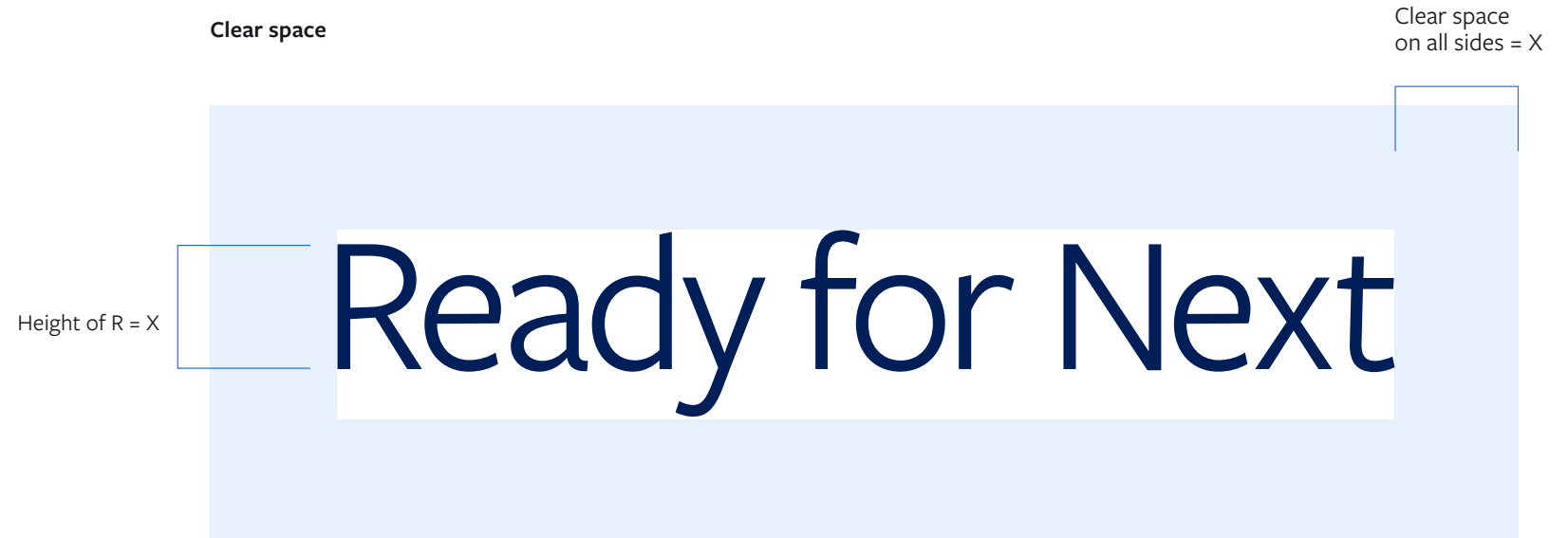
When using our tagline, it's important to account for the following restrictions.

## Clear space

When applying our tagline, ensure that it has adequate space around it. This buffer zone helps to prevent the tagline from being visually connected or paired with other messages, taglines, or branding elements.

## Minimum size

Always reproduce the tagline at sizes that ensure it remains recognizable. For notably small sizes, its reproduction should be done under careful supervision to ensure that the tagline retains its shape and form.



## Minimum size

Minimum tagline size  
3/16" or .1875 inches



# Tagline background control

## Color backgrounds

When placing our tagline on white or light backgrounds, including the light supergraphic, always use the tagline in its full-color form—in Broadridge Blue. This ensures that the tagline maintains its vibrancy and stands out clearly. On dark, black, or the Bright and Dark supergraphic backgrounds, the tagline should be rendered in white for optimal visibility and contrast.

## Black and white

In situations where color printing is not available or does not complement the surrounding space, the tagline may be reproduced in black or white.

This flexibility allows the tagline to adapt to various contexts while still preserving its visual integrity and recognizability.

**Primary**  
Blue tagline

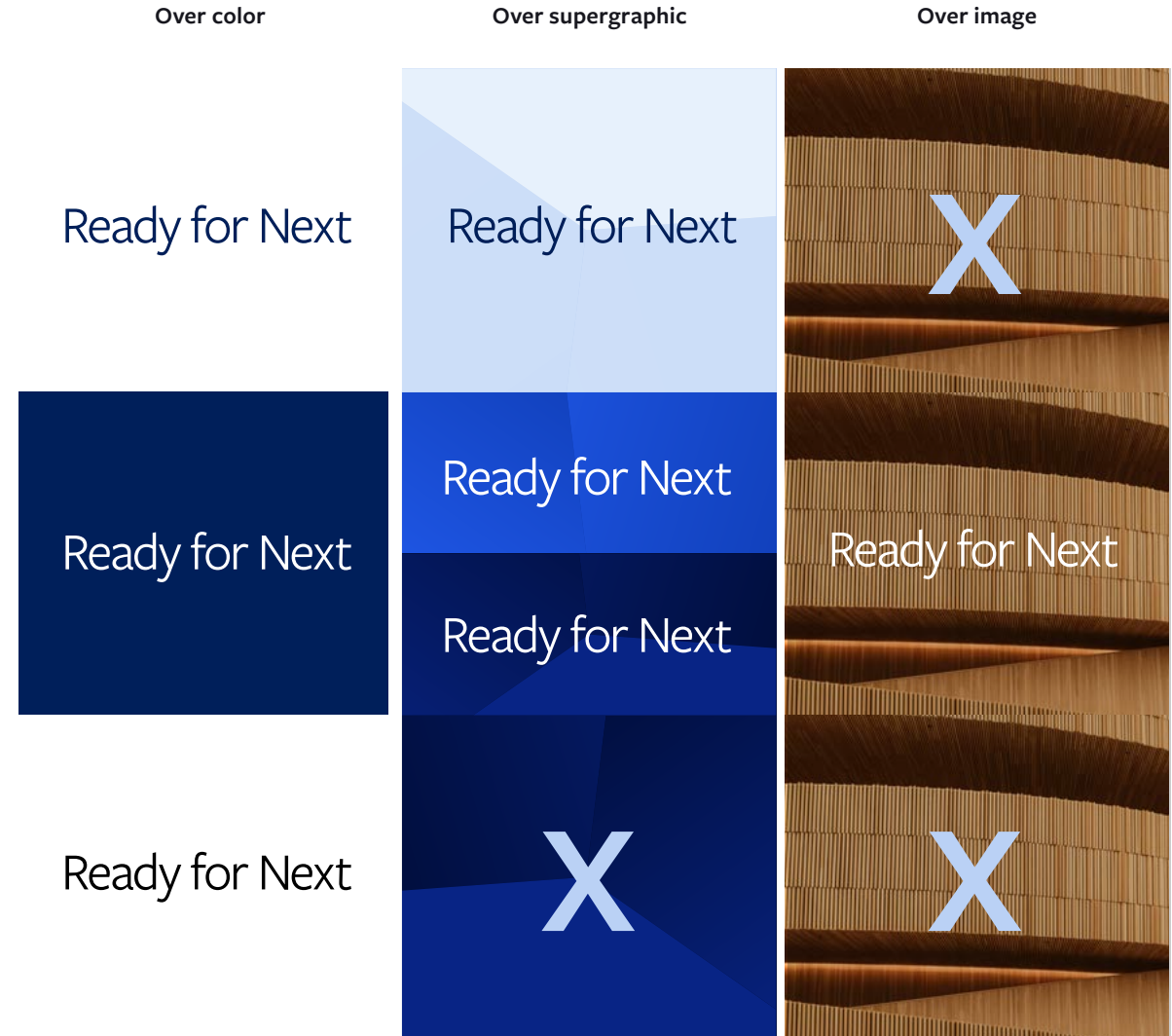
**Secondary**  
White tagline

**Restricted**  
Black tagline

Over color

Over supergraphic

Over image



# Tagline misuse

It's crucial to avoid common pitfalls to maintain brand integrity. For instance, always avoid:

1. Using legacy artwork
2. Reproducing the tagline in colors other than our primary blue, black, or white
3. Changing or distorting its proportions
4. Reproducing on an angle or vertical manner
5. Adding a drop shadow (a) or visual effects (b)
6. Placing the tagline within a holding shape or over an image
7. Scaling the tagline too small
8. Typesetting the tagline
9. Reproducing in low resolution

To ensure the tagline consistently represents the brand, always use the provided artwork without making any modifications.

1. Incorrect tagline version

Ready for Next

2. Incorrect tagline color

Ready for Next

3. Tagline proportions are distorted

Ready for Next

4. Tagline is on an angle

Ready for Next

5a. Tagline has a drop shadow applied

Ready for Next

5b. Tagline has a drop shadow applied

Ready for Next ✨

6. Tagline is placed in a container

Ready for Next

7. Tagline is too small

Ready for Next

8. Tagline has been typeset

Ready for Next

9. Logo is low resolution

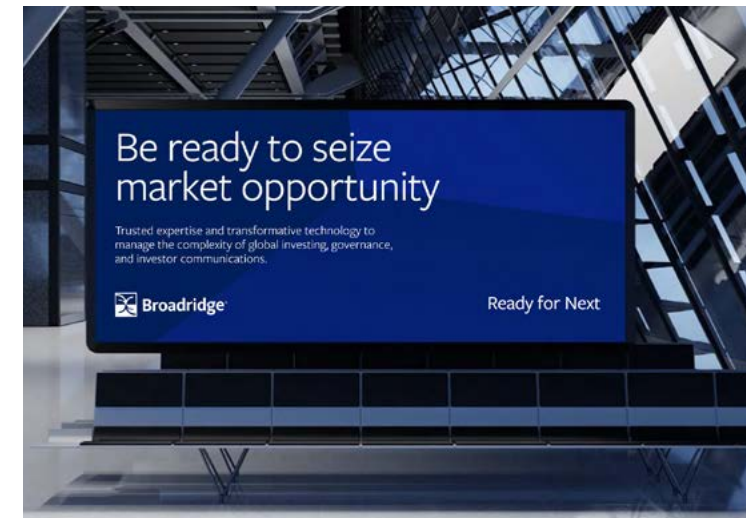
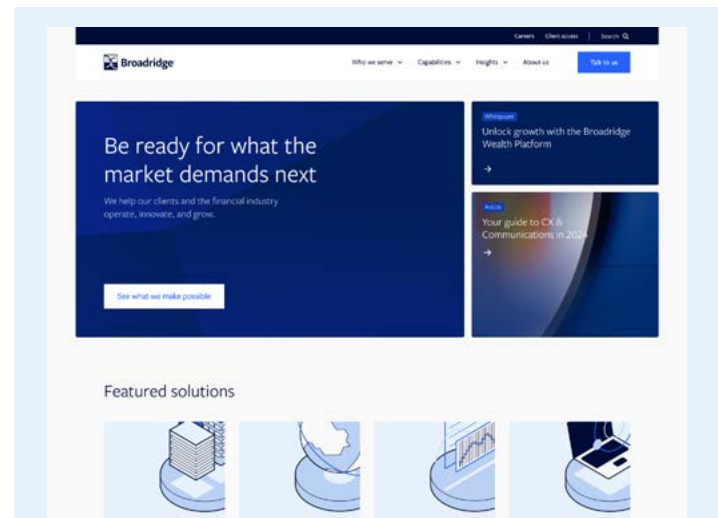
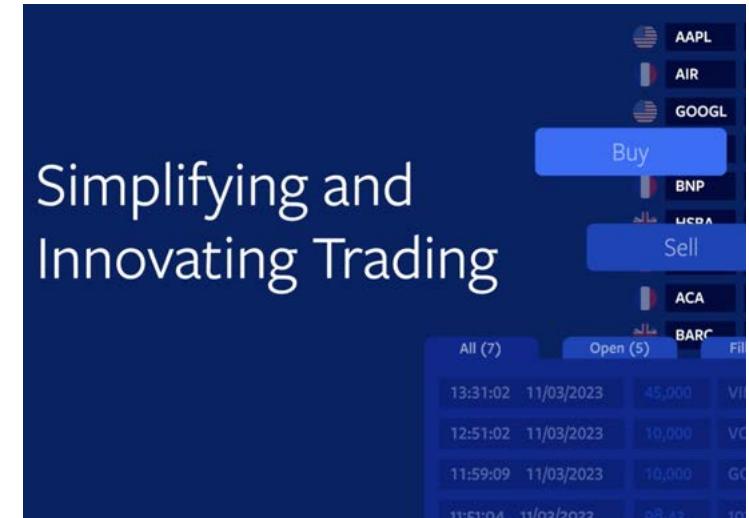
Ready for Next

# Our colors

Our brand's color makes it stand out and lead in its field.

Color is a powerful means of visual recognition and a strong aspect of brand differentiation. By using our branded colors consistently, you will increase the familiarity with our brand while helping us stand apart from our competitors.

Founded from our Broadridge primary blue, we've selected a companion palette of blues to that complement, support, and extend our visual signal.



## Getting started

Visit Our Brand to download these and other files key to building our brand.

# Color proportions

## Primary colors

Broadridge Blue embodies the trust and confidence that anchors the brand, it is the leading brand blue in most activations.

Vibrant and Open Blue add a controlled and fresh tone to the overall brand, they can be used as a leading tone for specific activations.

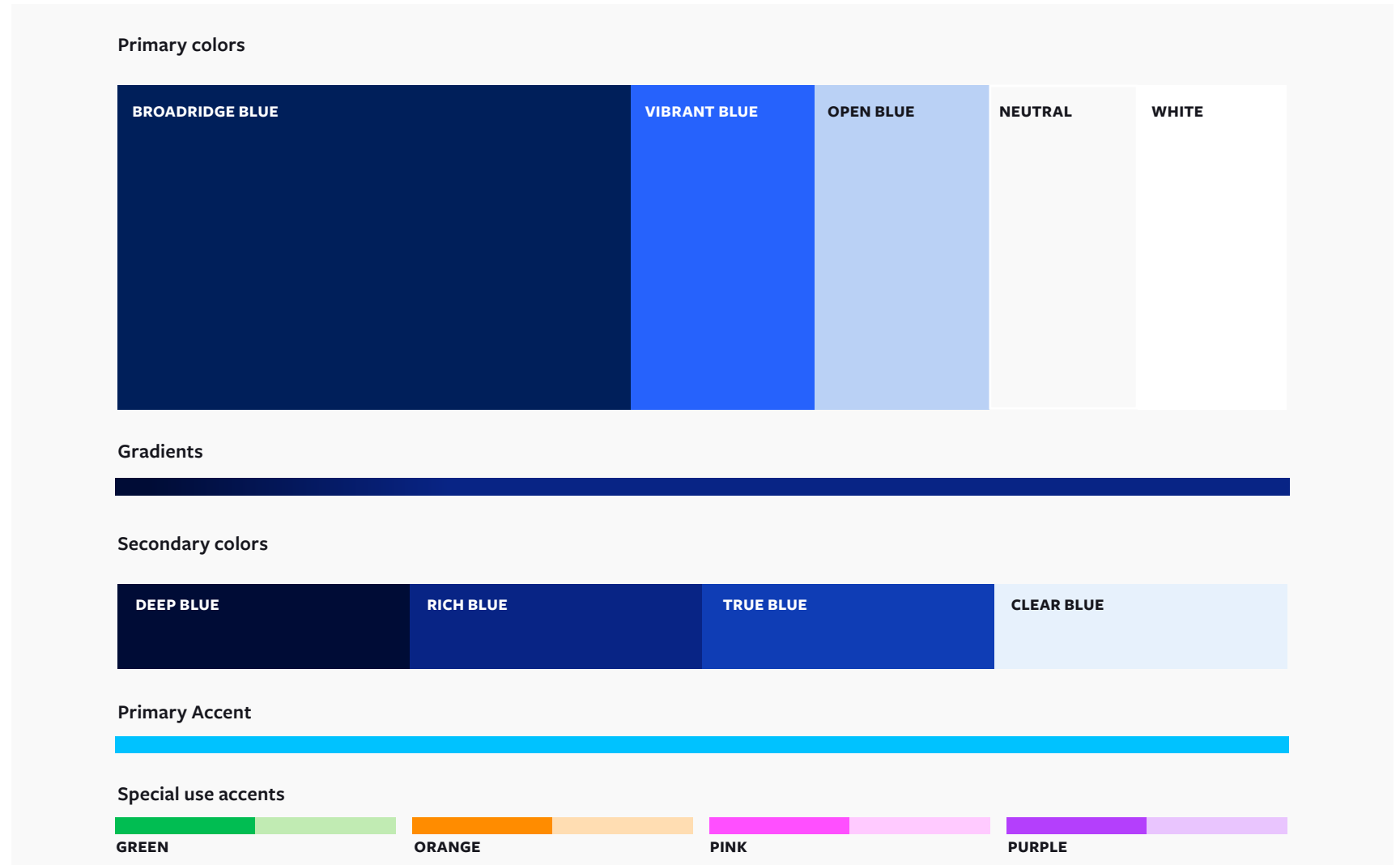
Neutrals create a reassuring and warm base for any content. They provide versatility because they work with all our other tones.

## Secondary colors

The extended blue palette adds depth to the brand, used sparingly in illustrations and gradients they support the primary blue palette.

## Special use accents

Smart colors chosen to complement our primary and secondary palette in specific situations to draw attention to or differentiate key information.



# Color specifications

## Primary and secondary colors

Our primary palette is a series of progressive blues anchored in the color of our logo, Broadridge Blue, representing the trust and confidence that is synonymous with our brand's heritage. The flowing blue tones create a vibrant and progressive appearance.

In addition to our primary blue, we use a secondary palette to create additional dimension and fidelity across our communications.

### Primary colors

#### BROADRIDGE BLUE

Pantone: 2757      HEX: 001f5a  
CMYK: 100/90/35/30      RGB: 0/31/90

#### WHITE

#### VIBRANT BLUE

Pantone: 2387      HEX: 2662fc  
CMYK: 93/55/0/0      RGB: 38/98/252

#### OPEN BLUE

Pantone: 2120      HEX: bad1f5  
CMYK: 20/5/0/0      RGB: 186/209/245

#### NEUTRAL

Pantone: Cool Gray 1      HEX: f9f9f9  
CMYK: 10/7/5/0      RGB: 249/249/249

### Our secondary colors

#### DEEP BLUE

Pantone: 2766      HEX: 000c36  
CMYK: 100/85/0/60      RGB: 0/12/54

#### RICH BLUE

Pantone: 661      HEX: 082485  
CMYK: 100/80/0/15      RGB: 8/36/133

#### TRUE BLUE

Pantone: 2728      HEX: 0f3db5  
CMYK: 100/75/0/0      RGB: 15/61/181

#### CLEAR BLUE

Pantone: 657      HEX: e7f1fc  
CMYK: 10/0/0/0      RGB: 231/241/252

### Our primary accent

#### INTELLIGENT CYAN

Pantone: 306      HEX: 00c2ff  
CMYK: 80/0/0/0      RGB: 0/194/255

### Text black

#### BLACK

CMYK: 0/0/0/100      HEX: 1616d  
RGB: 22/22/29

# Color specifications

## Special use accents

Our special use accents add distinctive highlights when designing applications that demand colors beyond our primary and secondary palette or require a focal color to differentiate information.

## Using our special use accents

- **Do** use, if necessary, for data visualization including charts and graphs, illustrations including frameworks and models
- **Do** use consistently across charts to focus the eye or highlight key information
- **Do** use only one accent per communication
- **Do** use accents sparingly and with restraint
- **Don't** use accents for background colors, typography, or your personal work emails

**For any other situation,** please obtain Brand approval. Reach out to [BrandInfo@Broadridge.com](mailto:BrandInfo@Broadridge.com).

### Special use accents

<b>GREEN</b> Pantone: 2257 CMYK: 80/0/95/0	HEX: 01bd52 RGB: 1/189/82
<b>ORANGE</b> Pantone: 151 CMYK: 0/65/100/0	HEX: ff8c00 RGB: 255/140/0
<b>PINK</b> Pantone: 907 CMYK: 5/80/0/0	HEX: ff4fff RGB: 255/79/255
<b>PURPLE</b> Pantone: 266 CMYK: 70/90/0/0	HEX: b43ffc RGB: 180/63/252

### Special use accent tints

<b>LIGHT GREEN</b> Pantone: 2254 CMYK: 30/0/35/0	HEX: c1ebb3 RGB: 192/235/179
<b>LIGHT ORANGE</b> Pantone: 918 CMYK: 0/20/40/0	HEX: ffddb2 RGB: 255/221/178
<b>LIGHT PINK</b> Pantone: 243 CMYK: 5/40/0/0	HEX: ffcaff RGB: 255/202/255
<b>LIGHT PURPLE</b> Pantone: 942 CMYK: 20/30/0/0	HEX: e9c5fe RGB: 233/197/254

# Color in use

Consistent use of color builds brand recognition. Over time, people begin to associate specific colors with your brand, which can make it instantly identifiable.

Broadridge is a blue brand as the examples at right demonstrate. It's important that we maintain this appearance across all touchpoints to continue to build value in our brand.



# Our primary font

Our typography complements our brand’s story and conveys our tone.

Typography is an integral part of any brand. By thoughtfully selecting and applying fonts, we strengthen our brand, communicate more effectively, and create lasting impressions with our audience.

Our font is Freight Sans, a highly legible sans serif that is both clean, modern, and accessible. We primarily use Freight Sans Book in our materials, with secondary weights—Light, Medium, and Semi-Bold—used to support our messaging for emphasis and legibility.

Freight Sans is a versatile typeface that works well as both a display font and as body copy. Hierarchy and emphasis can be drawn through stylistic choices such as weight, color and the use of italics.

Freight Sans is freely available to Adobe Creative Cloud subscribers. It can also be accessed for from Adobe Fonts using the following link.

[Access Freight Sans](#)

# Freight Sans

---

Primary weight — Freight Sans Book

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

---

Secondary weights

Light

Medium

Semi-bold

*Light Italic*

*Medium Italic*

*Semi-bold Italic*

# Our secondary font

Freight Sans is not available to all associates or accessible across all platforms.

## Microsoft Aptos

In lieu of Freight Sans, we rely on Aptos as our secondary, backup font, particularly for Microsoft applications, including Word, PowerPoint, and Outlook.

Aptos is readily available to all associates on all Broadridge platforms. It can also be downloaded for free from Microsoft using the following link.

[Download Microsoft Aptos](#)

# Aptos

---

Primary weight — Aptos Display

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

---

Secondary weights

Light

Medium

Semi-bold

*Light Italic*

*Medium Italic*

*Semi-bold Italic*

# Our type style

Our defined type styles create a consistent information hierarchy, helping our audience understand key takeaways.

## Case

Text is almost always set in sentence case with few exceptions other than eyebrows.

## Indicating important information

- Use color to highlight key words
- Use italics for callouts and quotes

## Numerals

All numerals should use the OpenType proportional lining figures.

**<H1>HEADLINES**  
Freight Sans Book

**<H2>DESCRIPTIVE COPY**  
Freight Sans Book

**<H3>EYEBROW**  
Freight Sans Semi-bold

**<H4>SUBHEADINGS**  
Freight Sans Semi-bold

**<P>BODY**  
Freight Sans Book

**<A>HYPERLINK**  
Freight Sans Semi-bold

**BUTTON**  
Freight Sans Semi-bold

# Are you ready for what's next?

Our representatives and specialists are ready with the solutions you need to advance your business.

## INSIGHTS

### Building client confidence through real results

More than 5,000 brands rely on us to deliver essential communications to their clients, creating richer customer experiences.

Financial firms rely on us to process daily trading of more than U.S. \$10 trillion in equities, fixed income and other securities globally.

For helpful resources you can visit [Client services](#)

**Button**

# Our type in use

Everyday examples of how typography helps drive our visual identity.

**Featured solutions**

- Asset Servicing
- Connectivity
- Market Intelligence
- Proxy Services

**Powering the pulse of the financial industry**

Capital Markets

**Our capabilities**

Wealth Advisor Solutions

**Recognized by the industry**

**Well Positioned for the Future**

As we enter fiscal 2025, I am pleased to report that Broadridge is operating from a position of strength. We are executing against our strategic priorities across our Governance, Capital Markets, and Wealth and Investment Management franchises. We are investing in the technology and solutions to capitalize on the long-term trends driving our \$60 billion and growing addressable market opportunity. That combination of execution and investment has Broadridge well-positioned to deliver on our vision of three-year financial objectives through fiscal 2026. Looking even further ahead, I have never been more optimistic about Broadridge's ability to drive long-term growth and shareholder value.

**Thank You to Our Stockholders, Directors, and Associates**

I would like to conclude with a sincere "thank you" to you, our stockholders, for your investment in Broadridge. It is through your support that we can take a long-term strategic view, reinvest in our business, and deliver superior long-term shareholder value. I would also like to thank our Board of Directors, all of whom are stockholders, for their continued support and valuable insight. I especially want to thank Les Brink, who will retire from our Board this fall. Les joined our Board when we became an independent company and served as Chairman and, since 2019, Lead Independent Director. He has been a strong voice for shareholders and a valuable resource to me personally. Finally, I would like to thank Broadridge's almost 15,000 associates, many of whom are also stockholders. The passion, dedication, and commitment of our associates to serve our clients every day is why Broadridge is a trusted partner for change. As we continue to power the transformation of financial services, we are enabling better financial lives for millions.

*Tim Gasky*  
Tim Gasky  
Chief Executive Officer

**2024 Financial Highlights**

Fiscal years ended June 30,	2024	2023	2022	2021
Dollars in millions, except per share amounts				
Total Revenues	\$4,007	\$4,261	\$2,720	\$4,014
Recurring revenues	\$4,223	\$3,987	\$3,723	\$2,210
Operating income	\$1,017	\$746	\$760	\$479
Operating income margin	25.4%	17.5%	27.9%	11.9%
Adjusted Operating Income	\$1,263	\$1,199	\$1,068	\$867
Adjusted Operating Income margin	31.5%	28.1%	39.2%	21.6%
Diluted earnings per share	\$4.81	\$3.30	\$4.55	\$4.15
Adjusted earnings per share	\$7.73	\$7.01	\$6.46	\$5.68
Cash dividends declared per common share	\$1.50	\$1.50	\$1.50	\$2.20

**RECURRING REVENUES**

Bar chart showing growth from 2021 to 2024. 2024 shows a +10% CAGR FY21-FY24.

**EARNINGS PER SHARE**

Bar chart showing growth from 2021 to 2024. 2024 shows a +8% CAGR FY21-FY24.

**DIVIDENDS PER SHARE DECLARED**

Bar chart showing growth from 2021 to 2024. 2024 shows a +12% CAGR FY21-FY24.

**Broadridge: 60 Years of Trusted Expertise**

Broadridge is a global fintech leader with over \$6 billion in revenues.

Combining trusted expertise with transformative technology we provide the critical infrastructure that powers investing, corporate governance and communications to ensure operational resilience, elevated business performance and transformational investor experience.

Our infrastructure and voting platforms underpin the global proxy ecosystem. We understand the challenges in the market and deliver innovative tech-driven solutions that drive business development and growth.

Right now, across the globe, we are seeing significant shifts in market dynamics. In addition to growing market volatility, corporate issuers face a lack of transparency around who shareholders are and their preferences, growing regulatory pressure, high IR costs and increased focus on ESG.

Our smart analytics dashboard, Investor Insights, provides the granular insights and transparency you need to make more strategic decisions and effectively engage with your shareholders to drive long-term growth.

- 58k public companies supported
- 9.1T+ shares processed
- 100+ global markets

Investor Insights, be ready for shifts in market dynamics

**Enabling the next step: From eyeballs to handshakes**

Optional subtitle

- 5000+
- 10T
- 95%

Be ready for next

More than 5,000 brands rely on us to deliver essential communications to their clients, creating richer customer experiences.

Financial firms rely on us to process daily trading of more than U.S. \$12 billion in equities, fixed income and other securities globally.

Clients look to us to provide visibility into the interposition of 90% of all ETF assets and 90% of all long-term mutual fund assets.

# Our supergraphic

A proprietary visual element that helps establish our identity.

## The Transformative Network supergraphic

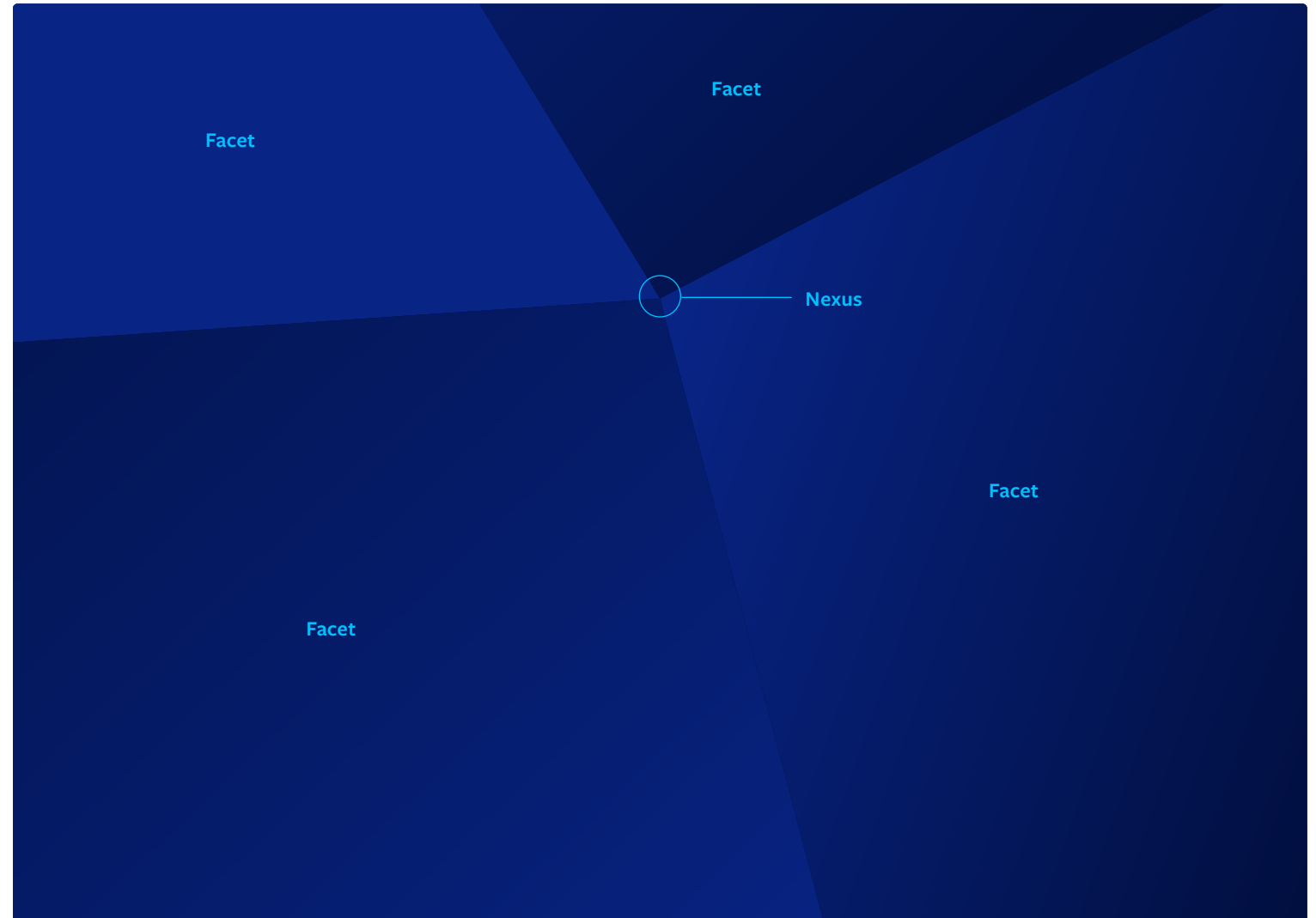
Our graphic device, applied with purpose, adds depth and dynamism to layouts.

### Nexus

The point of convergence, or nexus, draws focus and expresses unparalleled precision.

### Facets

The color fields expanding from the nexus are referred to as facets.



### Getting started

Visit Our Brand to download these and other files key to building our brand.

# Supergraphic variations

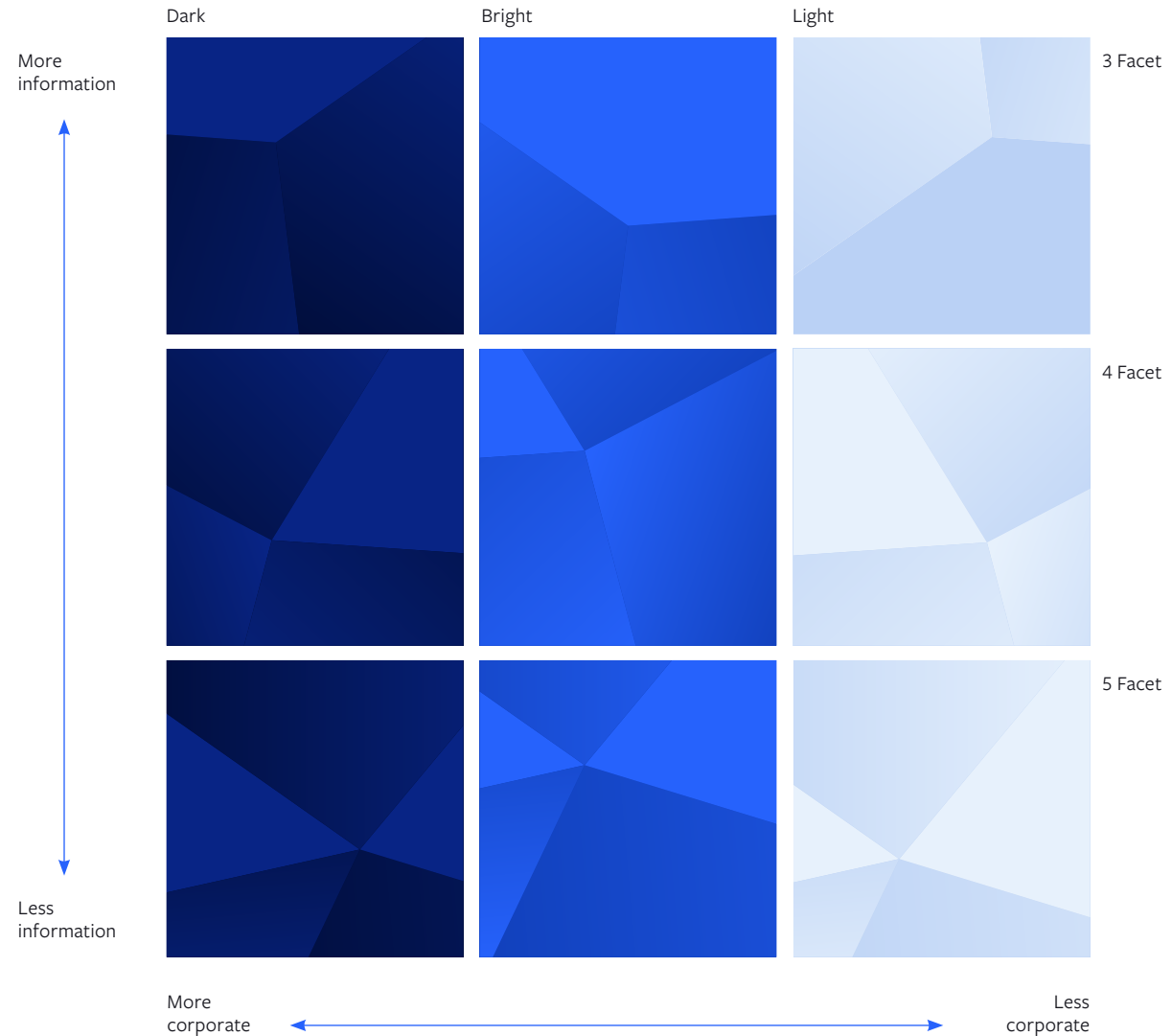
Available in three color ways and three different configurations, our supergraphic is designed to adapt to various experience without distracting from the message.

## Color ways

Our supergraphics come in 3 different colors—dark, bright, and light. The dark supergraphics are the primary color way, used for covers and high-level communications such as our annual report. The bright and light color ways are the secondary color way, more applicable to interiors or less corporate communications such as section dividers or a down-page component on our website.

## Configurations

We've provided variations made up of 3, 4, and 5 facets. As a general rule, use less facets for more information and more facets for less information.



# Supergraphic application

There are 3 key variables to applying the supergraphic appropriately. These variables allow for flexibility while ensuring both consistency and avoiding undesirable placements.

## Position

Place the nexus of the artwork at any point within the position zone. The position zone is unique to every communication based on its dimensions.

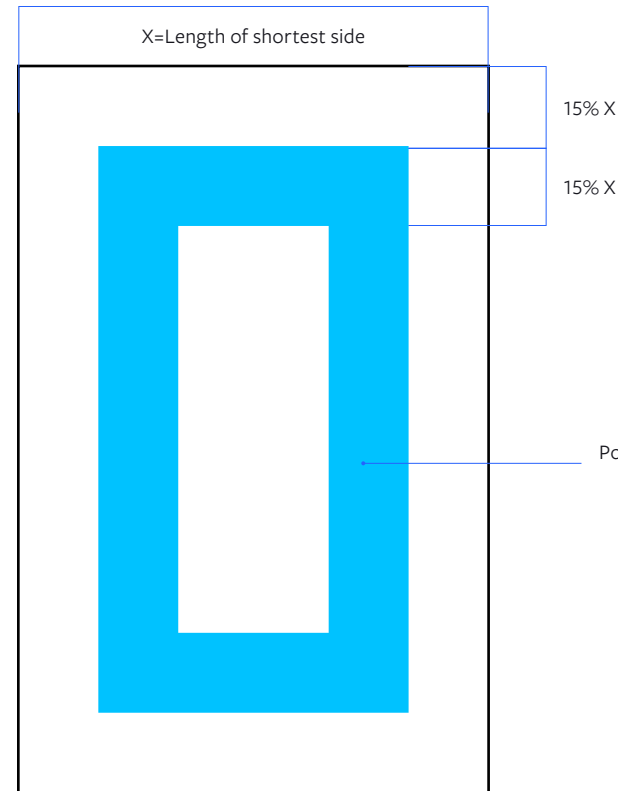
## Scale

The supergraphic may be scaled up and down, as large or small as needed for your communication.

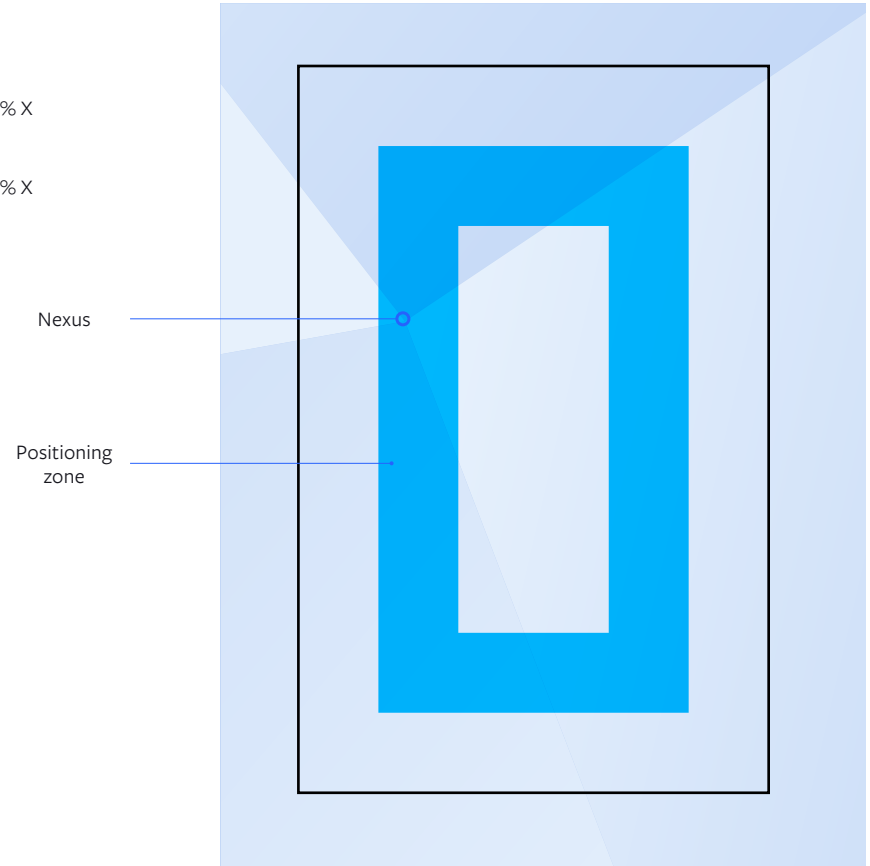
## Rotation

The supergraphic may also be rotated as required to ensure any content remains unobscured by the facet edges.

Position guide



In practice



# Using the supergraphic appropriately

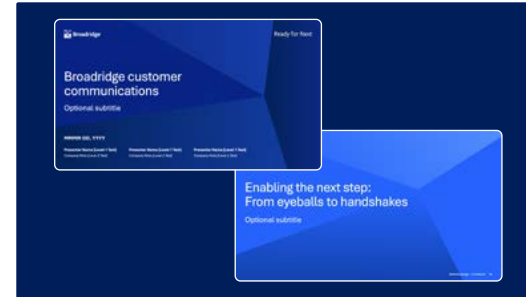
Key points to keep in mind when using the supergraphic:

1. **Do** use the nexus point to draw attention to content or activate open spaces
2. **Do** use multiple color ways and/or facet configuration throughout your communication
3. **Don't** place the nexus point behind headshots or logos
4. **Don't** allow the supergraphic to obscure messaging
5. **Don't** create new supergraphics or modify existing ones
6. **Don't** crop the nexus outside the approved area
7. **Don't** use the supergraphic to crop photos or content
8. **Don't** place the nexus point in the center of the document
9. **Don't** place supergraphics side by side

✔ Nexus point placed in an open area to activate the empty space



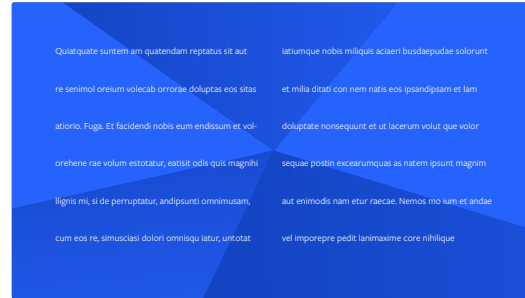
✔ Multiple color ways and facet configurations have been used in the same presentation



✘ The supergraphic is creating an undesirable sunburst effect behind the portrait



✘ The supergraphic is making the copy hard to read



✘ An unapproved color way has been created



✘ The nexus has been placed in the center of the document



✘ An image has been placed within a facet of the supergraphic



✘ The nexus has been placed in the center of the document

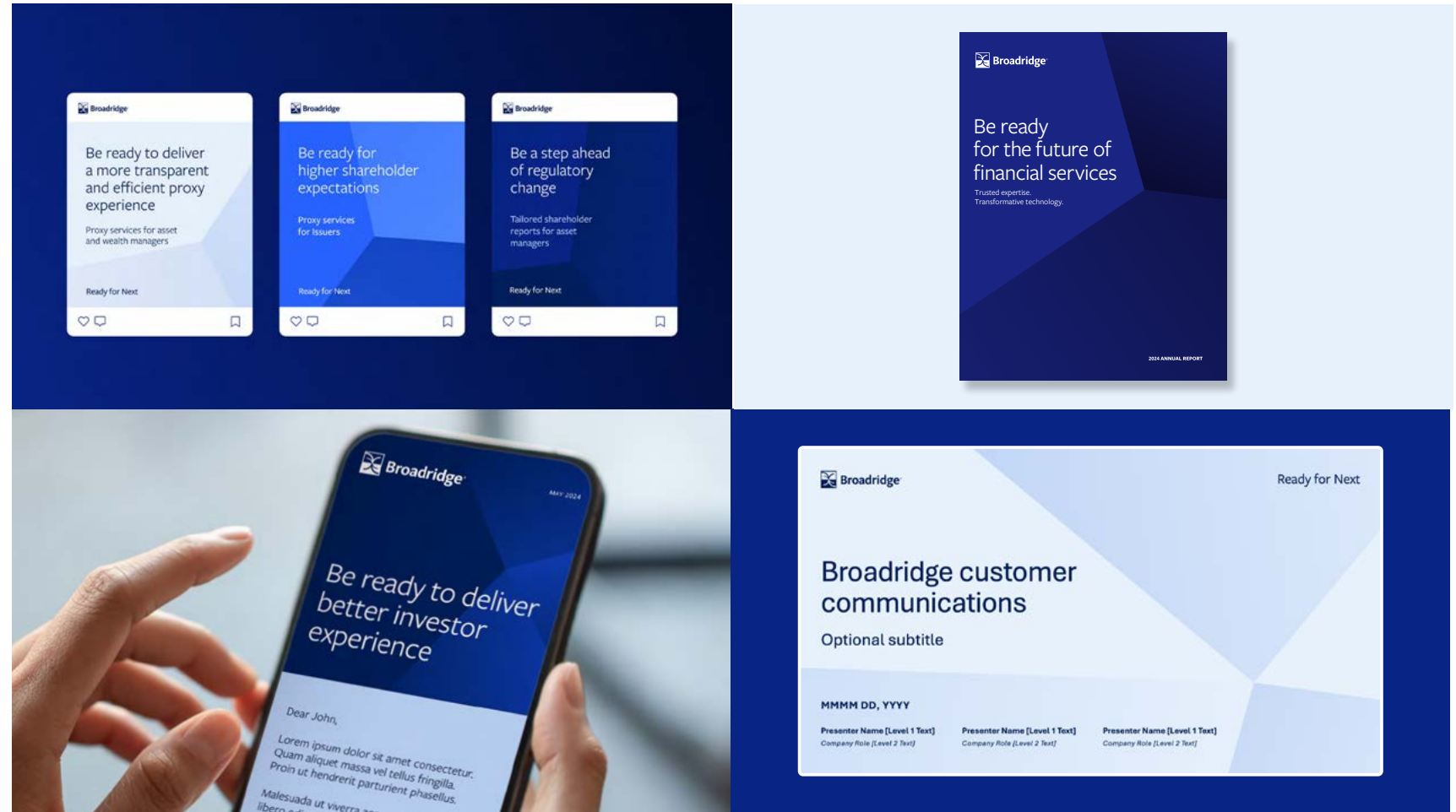


✘ Two supergraphics have been placed side by side



# Supergraphic in use

The Transformative Network graphic device can express and manifest the Broadridge brand through a variety of touchpoints.



# Photography

Photography helps enhance our brand and foster emotional connections with our audiences.

Photography enables brands to tell their stories visually. Compelling images convey complex messages quickly and emotionally connect with our audiences, often more effectively than words alone.

Consistent use of our photographic style helps us reinforce our brand's identity. It helps create a recognizable aesthetic that our audiences can instantly associate with Broadridge. Authentic, relevant, high-quality photography also enhances our brand's credibility. Photography that resonates with our audience's businesses or aspirations can enhance brand loyalty and build trust. It shows that we understand and align with their world.



Confident engagement



Candid moments



Depth of field



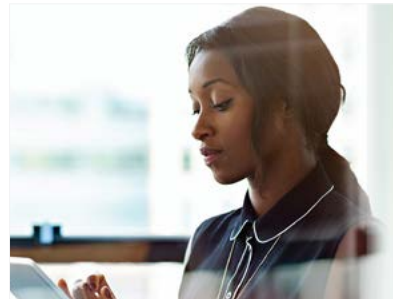
Leading lines

## Getting started

Visit [Our Brand](#) to download these and other files key to building our brand.

# Portrait photography

Through our portrait photography, we present ourselves as professional and sophisticated, yet approachable and warm.



## Light flares

Occasional use of light flares brings a sense of fresh, bright clarity. Incorporating natural light avoids the starkness of artificial lighting.

## Natural framing

Avoiding overly-posed portraiture, we capture natural moments. This creates a professional but approachable feel, portraying our people as optimistic and trustworthy.

## Incorporating blue

Incorporating elements of our Broadridge Blue into backgrounds or styling grounds our portraiture within our brand.

## Framing variety

We use a variety of framing crops in our portraits to avoid becoming monotonous. We can use close-ups to focus in on expression or full body shots to show confident body language.

# Spatial photography

We portray our spaces by focusing on clean and simple lines, upward angles, and bursts of Broadridge Blue.



## Leading lines

Simple, structured use of lines suggests organization, reliability, and purposeful momentum, as the lines lead our viewpoint through wider spaces.

## Motion blur

Motion blur captures our agile approach by reflecting ongoing movement within our spaces.

## Capturing details

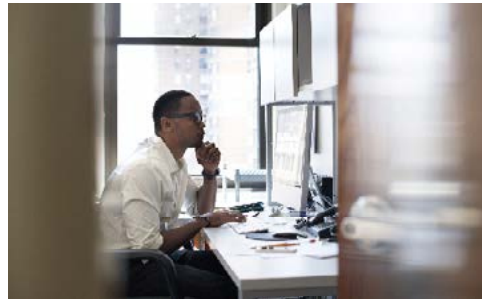
Close crops or highlighting certain features within our spaces shows our attention to detail, and creates contrast as we show both macro and micro.

## Balancing color

Purposeful use of our broadridge blue alongside calming neutrals brings energy to the solid foundation of our spaces.

# At work photography

We show ourselves in our environment working collaboratively, with confidence and trust.



## Depth of field

Simple, structured use of lines suggests organization, reliability, and purposeful momentum as the lines lead our viewpoint through wider spaces.

## Candid moments

Motion blur suggests our agile approach by reflecting ongoing movement within our spaces.

## Confident engagement

Our people are portrayed in moments of confident collaboration, always captured in engaging conversations, giving a feeling of trusted cooperation.

# Abstract imagery

Our abstract photography features architectural crops that capture our sense of flow and confident forward momentum.



## Optimistic blue skies

We can bring in nature through bright, curved architectural shots that feature blue skies. This gives an optimistic feel and grounds the imagery in our brand.

## Smooth momentum

We look for architectural textures with curved forms to give a sense of progression. Areas of warm light lift and contrast the man-made structures.

## Natural warmth

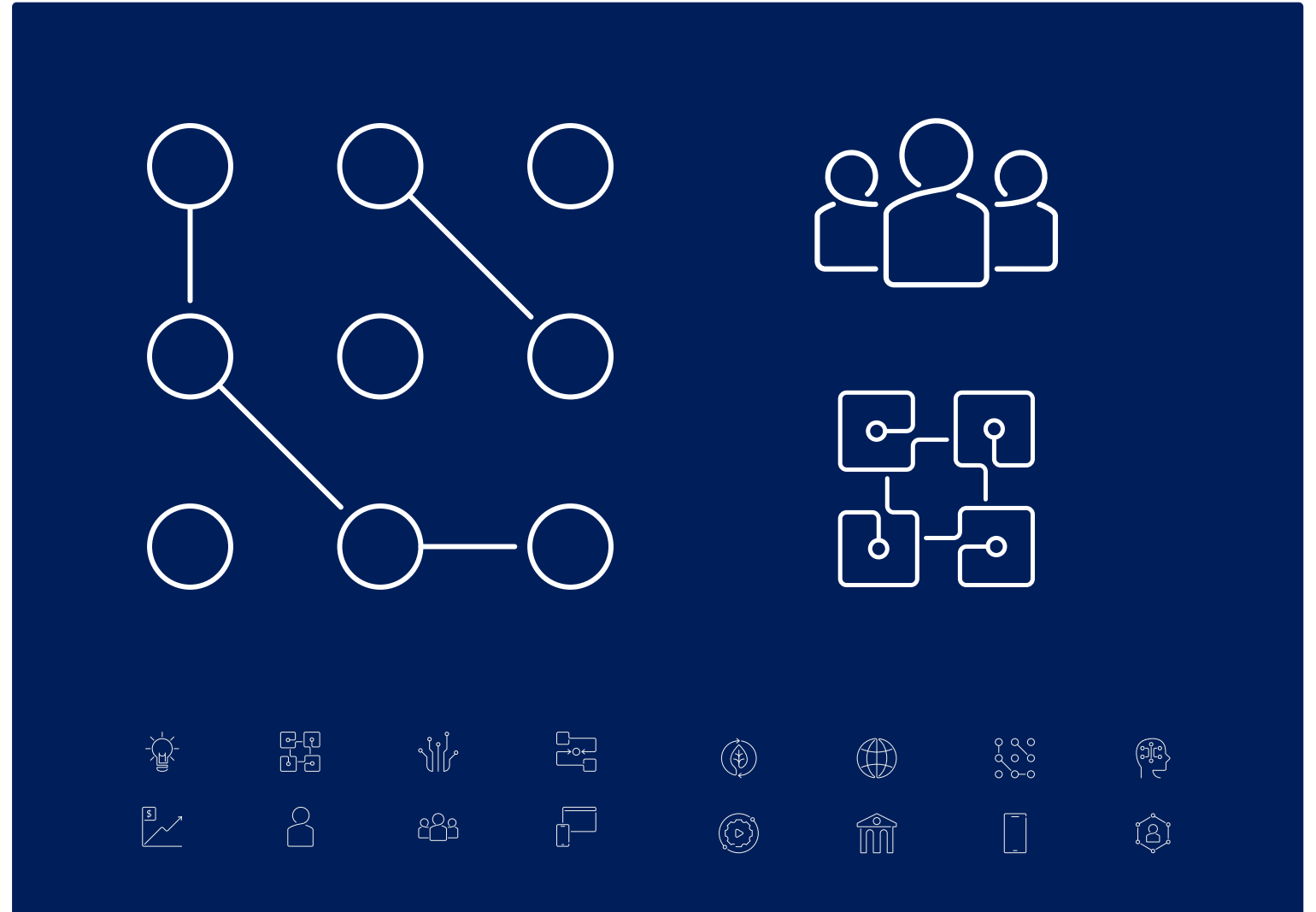
To bring balance we are conscious to include architecture with warmer textures and tones, such as wood.

# Iconography

Iconography is the visual shorthand we use to communicate efficiently.

Icons are more than art or clickable elements, they're metaphors filled with meaning that help us tell universal stories. Use icons to emphasize important points, draw the audience to specific points of information, or illustrate a call to action.

Overuse of icons can dilute their impact. Correct implementation will help audiences quickly understand our messages.



**Getting started**  
Visit [Our Brand](#) to download these and other files key to building our brand.

# Iconography principles

## Continuous outline style

Our iconography uses continuous outline to draw each metaphor. This clear, confident gesture style helps make our icons proprietary and brings to life our design principles.

## Thin stroke

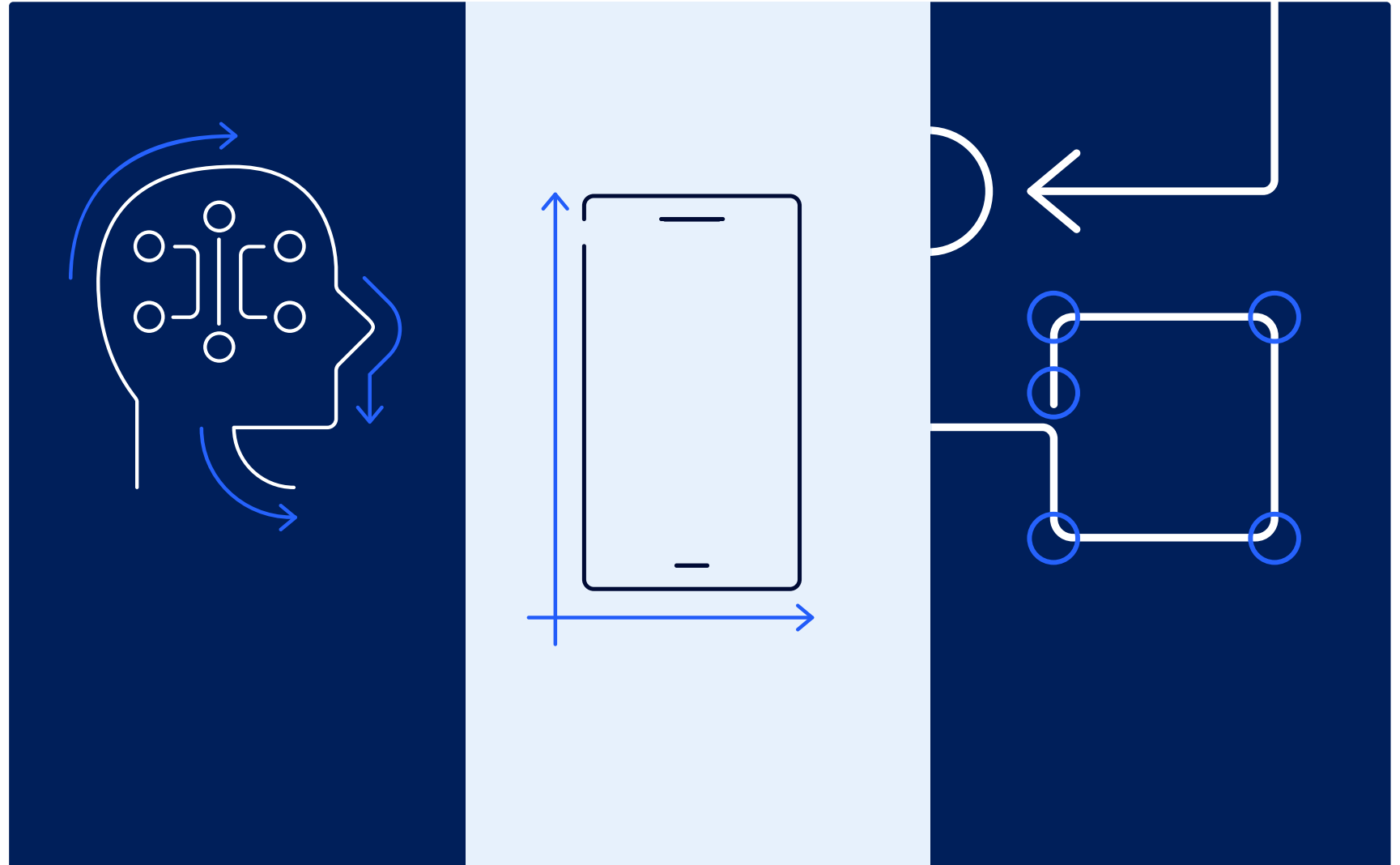
Whether they're large or minuscule, our icons should always exude a sense of lightness. They must avoid the extremes of hairline fragility or bold heaviness, finding a balance that reproduces cleanly across screens and on paper.

## Rounded terminals

Our icons are detailed with slightly rounded terminals to make them feel warmer and more human.

## Primary color

The primary color ways for our icons are Broadridge Blue or White for the icon strokes.



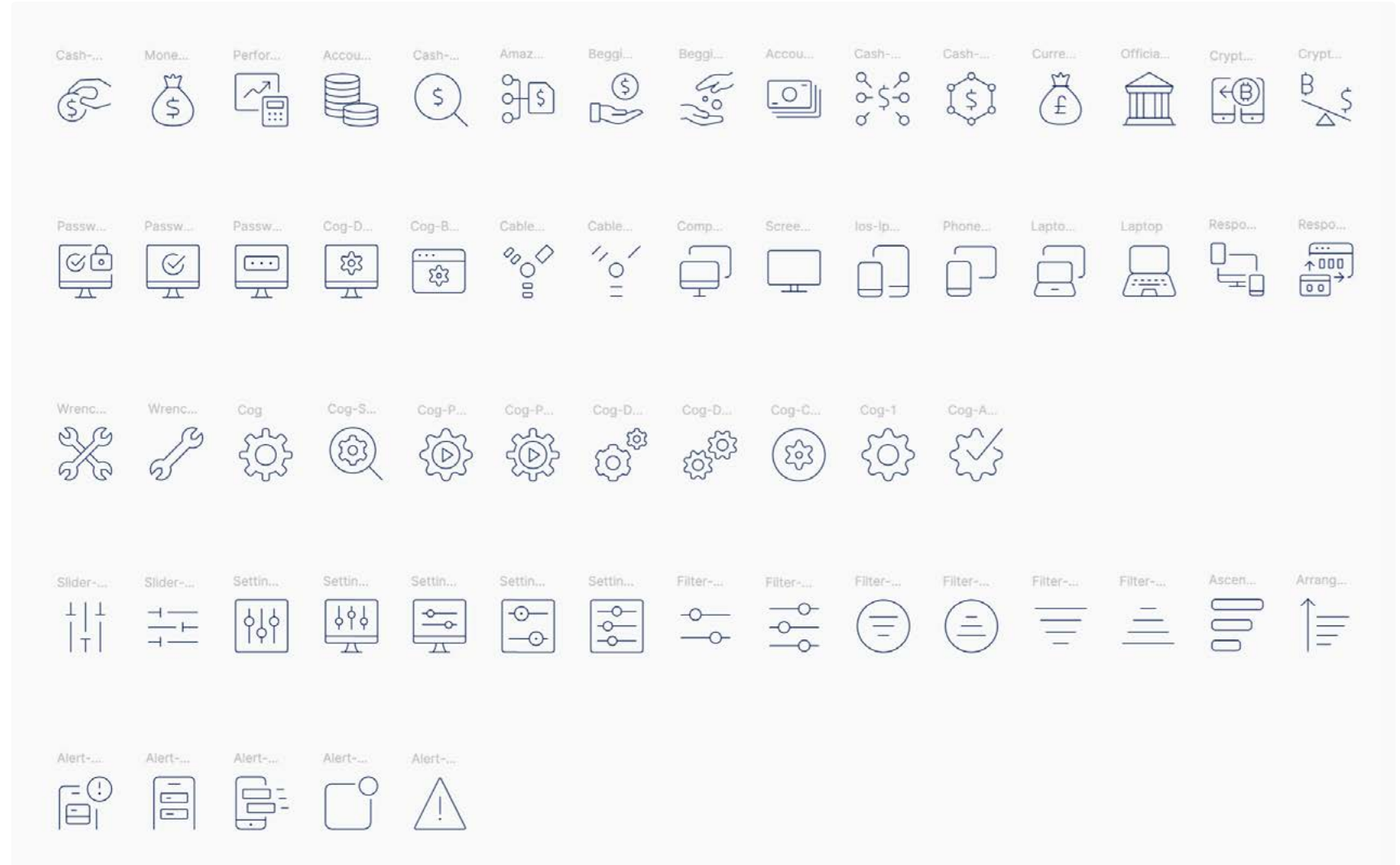
# Iconography resources

We utilize iconography from the [Streamline Icon library](#).

To assist those without access, we've selected a library of icons for associates to work with. This library is available as a Figma resource and, in a more limited capacity, a PPT document. At right is a sampling of the many icons that can be found in the library.

If you need an icon not found in the library, please reach out to [BrandInfo@Broadridge.com](mailto:BrandInfo@Broadridge.com) to for help locating or creating an icon for your needs.

Sampling of icons included in library



# Iconography examples

Icons help us reinforce and bring to life our messages, without overpowering the message itself.

The 10 key dimensions of digital transformation leadership

Innovation culture	Digital skills and talent
Digital customer experiences	Data security and privacy
Digital regulatory compliance	Agile software deployment
Automation tools	Data management
Modernized core IT	Harnessing emerging technologies

It's time to double down on your customer obsession

Investors

Financial institutions

Corporate Issu

46%

76%

Be ready for next

5000+

More than 5 essential co-creating rich

10T

Financial fir of more than income and

95%

Clients look distribution of 20% or an ETF assets and 20% of all long-term mutual fund assets.

BLOCKCHAIN INSIGHTS

Blockchain comes of age

Companies are well on their way to building out a blockchain infra investment by 20% on average over the next two years and almost midway through or advanced in their implementations as compar

[Expand for more insights](#)

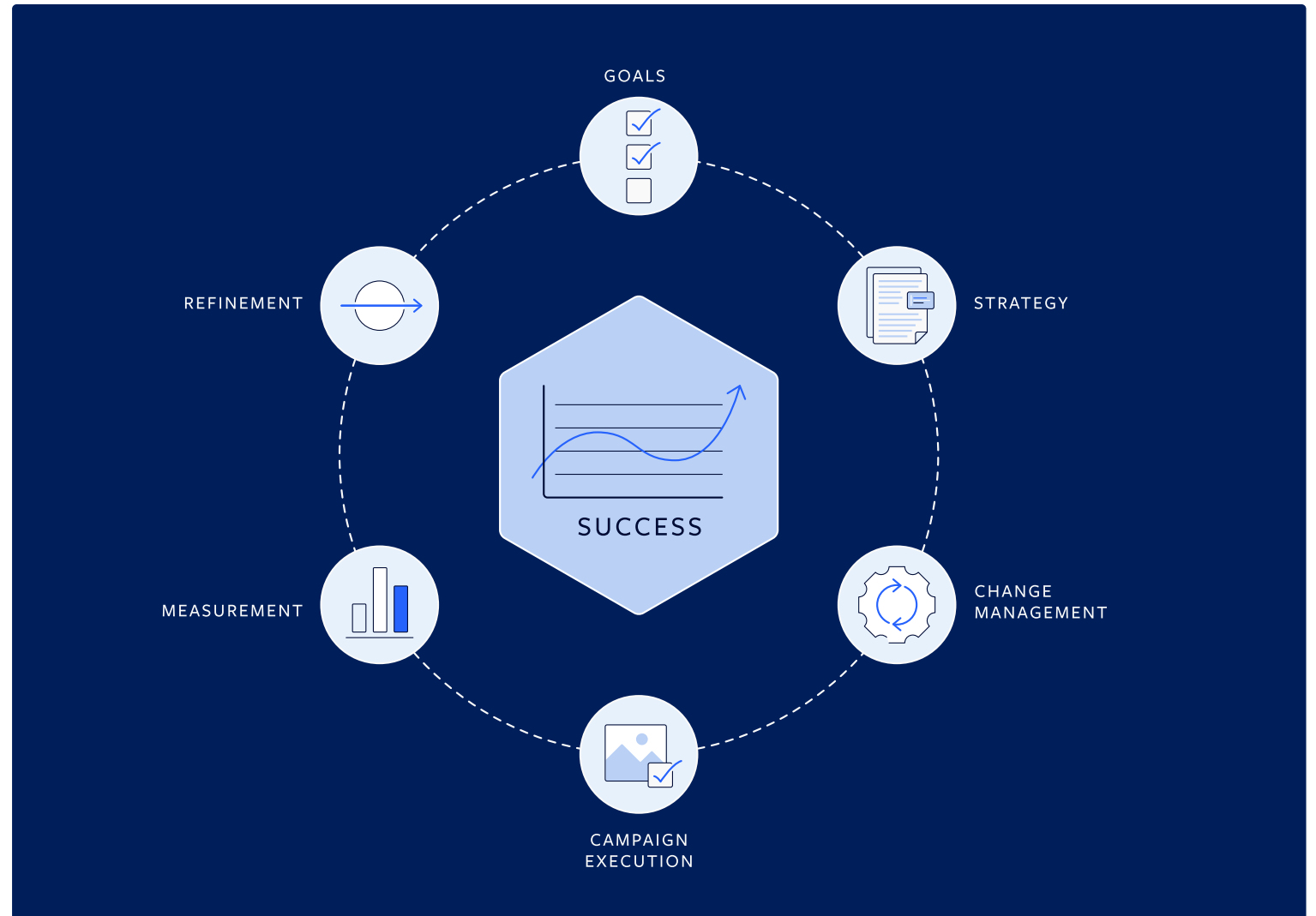
©2024 Broadridge • Confidential 38

# Illustration

Illustration helps simplify a complex world.

Our illustrations are crafted from the same style foundations as our icons and are used to present complex ideas, frameworks, models, and processes.

Our illustration style supports clarity of concept by balancing sophistication and simplicity.



## Getting started

Visit [Our Brand](#) to download these and other files key to building our brand.

# Illustration principles

## Solid forms and rounded terminals

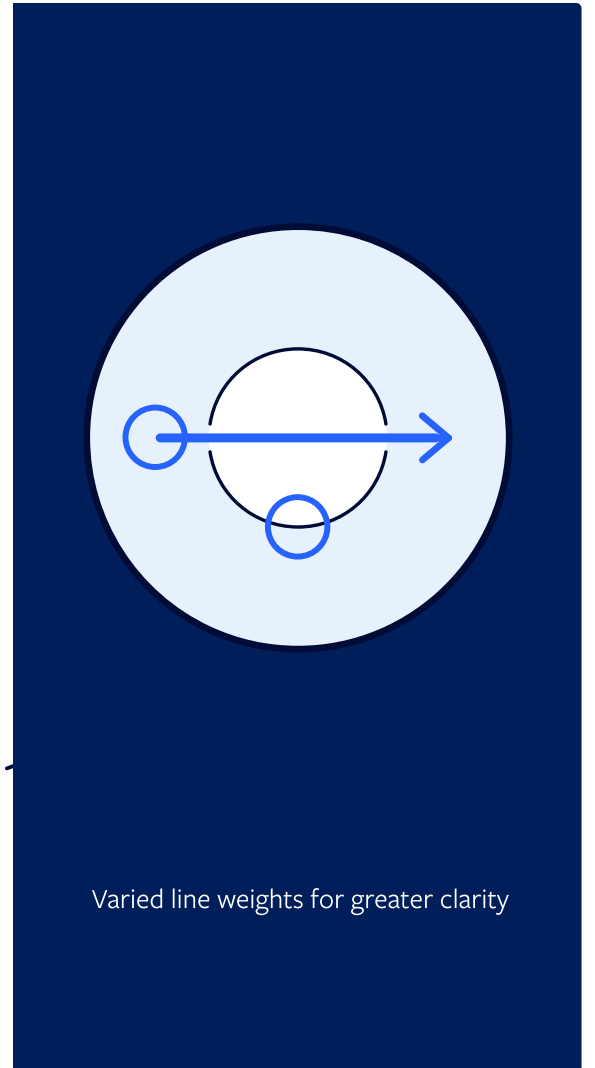
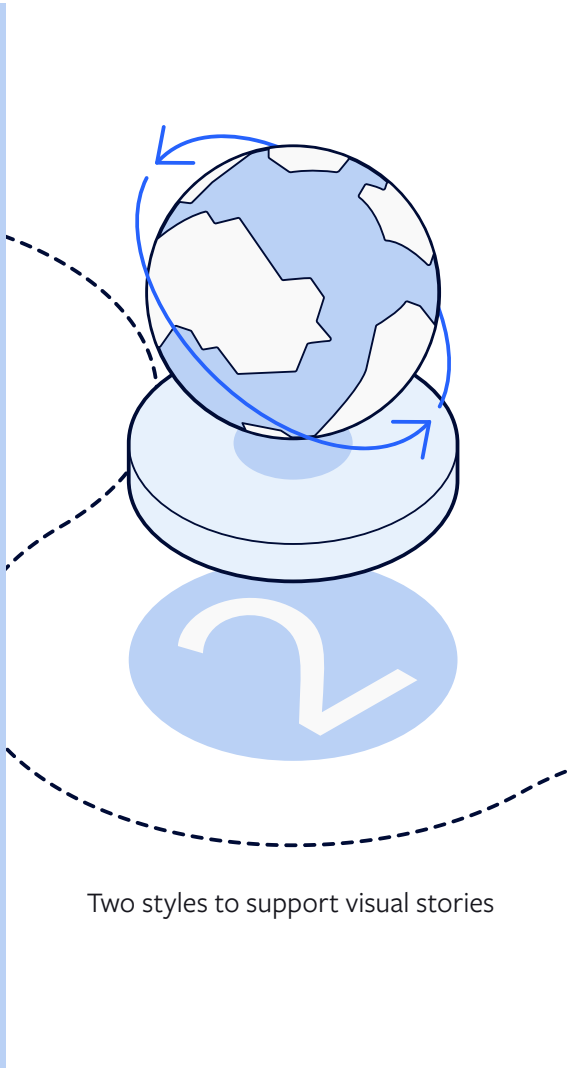
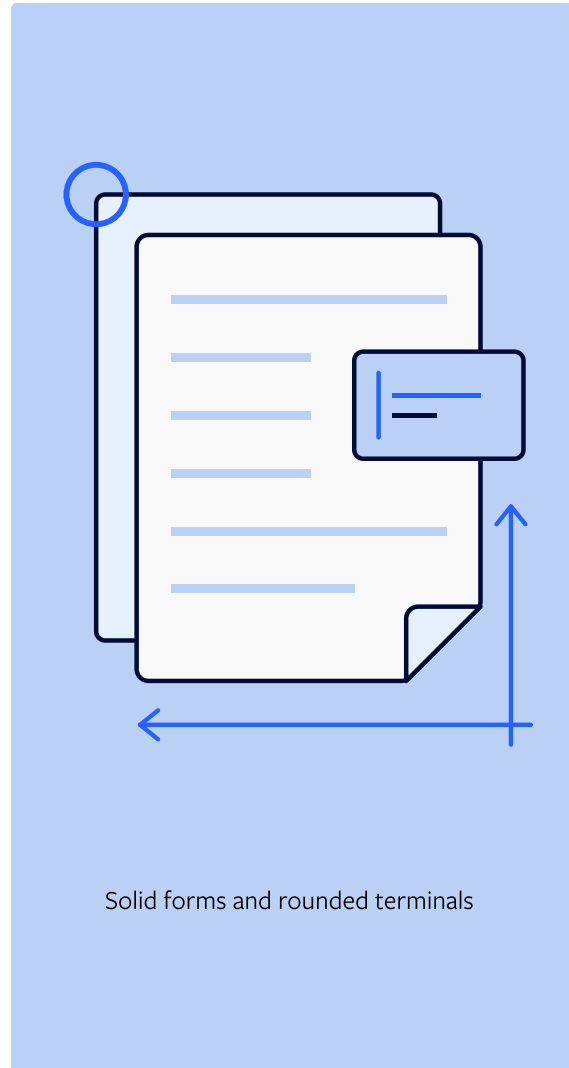
Our illustration uses defined, solid forms and rounded terminals to create the appearance of tangible, real items that are friendly and accessible.

## Two styles to support visual stories

We use both a face-up, straightforward style and, for more elaborate, story-telling illustrations, a multiplane isometric style.

## Varied line weights for greater clarity

Using different line weights within the illustration provides contrast, increases interest, and establishes hierarchy.



# Illustration examples

At right are everyday examples using our illustration style to reflect dense information with intricate detail that is easy to understand.

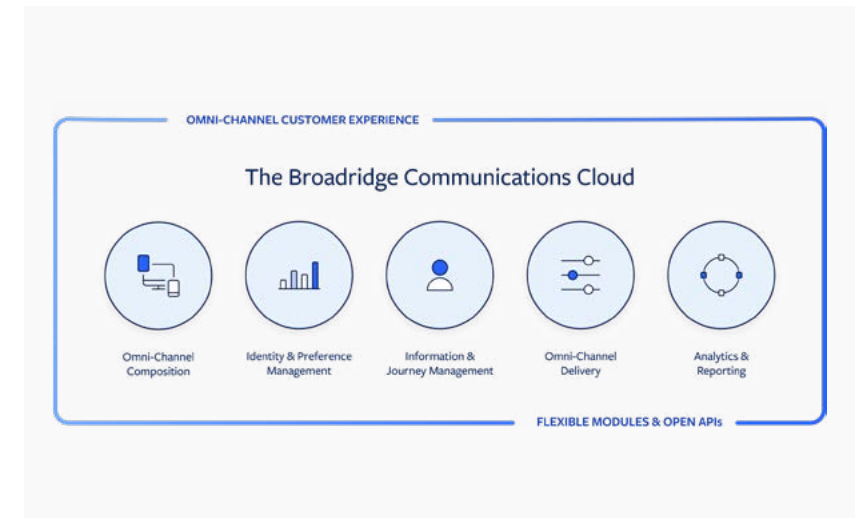


### Featured solutions

<p><b>Asset Servicing</b> Lorem ipsum dolor sit amet consectetur.</p> <p>→</p>	<p><b>Connectivity</b> Lorem ipsum dolor sit amet consectetur.</p> <p>→</p>	<p><b>Market Intelligence</b> Lorem ipsum dolor sit amet consectetur.</p> <p>→</p>	<p><b>Proxy Services</b> Lorem ipsum dolor sit amet consectetur.</p> <p>→</p>
--	---	--	---

**Powering the pulse of the financial industry**

Our technology and expertise stand as the heartbeat of investing, corporate governance, and communications to improve performance and transform investor experience.

This section features four vertical panels, each representing a different solution. Each panel contains a blue icon on a pedestal, a title, a short description of Lorem ipsum text, and a right-pointing arrow. Below the panels is a bold heading 'Powering the pulse of the financial industry' and a paragraph of text describing the company's role in the industry.

# Data visualization

Visualizing information brings clarity to an abundance of data.

Data is oxygen to Broadridge and our clients, so our goal is to ensure the data is accessible, clear, and leading to insight.

Drawing from our design principles, we use dynamic smooth lines, clear solid shapes, and smooth rounded labels. We strip away the unnecessary to focus the viewer on the key aspects of the data that is most useful to them.

Priority areas for AI investments — now and over the next 2 years



## Getting started

Visit Our Brand to download these and other files key to building our brand.

# Data visualization principles

Creating great charts and graphs involves several key principles to ensure they are both effective and engaging.

By following these principles, you can create charts and graphs that effectively communicate your data and insights to your audience.

At right are key points to consider:

## Clarity and Simplicity

**Avoid overloading**—keep your charts and graphs simple to avoid overwhelming your audience. Focus on conveying one main message or data point.

**Clear labels and legends**—ensure that all axes, data points, and legends are clearly labeled. This helps viewers understand the data at a glance without confusion.

**Consistent formatting**—use consistent colors, fonts, and styles throughout your charts and graphs to maintain a professional appearance and aid comprehension.

## Relevance and Focus

**Align with your narrative**—Ensure that your charts and graphs are directly relevant to the story or message you are conveying. They should enhance understanding, not distract from your main points.

**Highlight key data**—Use color or size to highlight important data points or trends. This draws attention to the critical aspects of the data you want your audience to remember.

**Appropriate selection of chart type**—Choose the right type of chart or graph for your data. For example, use line charts for trends over time, bar charts for comparisons, and pie charts for parts of a whole.

## Accuracy and Integrity

**Accurate representation**—Ensure that your data is accurately represented without distortion. Avoid manipulating axes or cherry-picking data points to mislead the audience.

**Source and citation**—Include data sources and citation if applicable, providing transparency and credibility to the information presented.

**Proportionate scaling**—Keep visual elements proportionate to the values they represent, maintaining integrity and providing viewers with accurate context.

# Data visualization examples

At right are everyday examples using our data visualization style to bring to life important information.



# Grid system

Grids ensure all elements and components of our visual system work together.

Visual organization promotes clarity and understanding. Our communications are underpinned by a modular, grid system that provides a thoughtful base for all our designed content and supports consistency.

## 12-column grid

The adaptive grid's flexibility is based on a 12-column system. It can be easily adjusted for different formats by dividing the columns to provide versatile layout choices.

## Margins

The margin width is equal to 4% of the longest side of the format.

## Gutter

The gutter width is equal to 2% of the longest side of the format.

12 column grid using 4% margin



12-column grid as applied to 2024 Annual Report



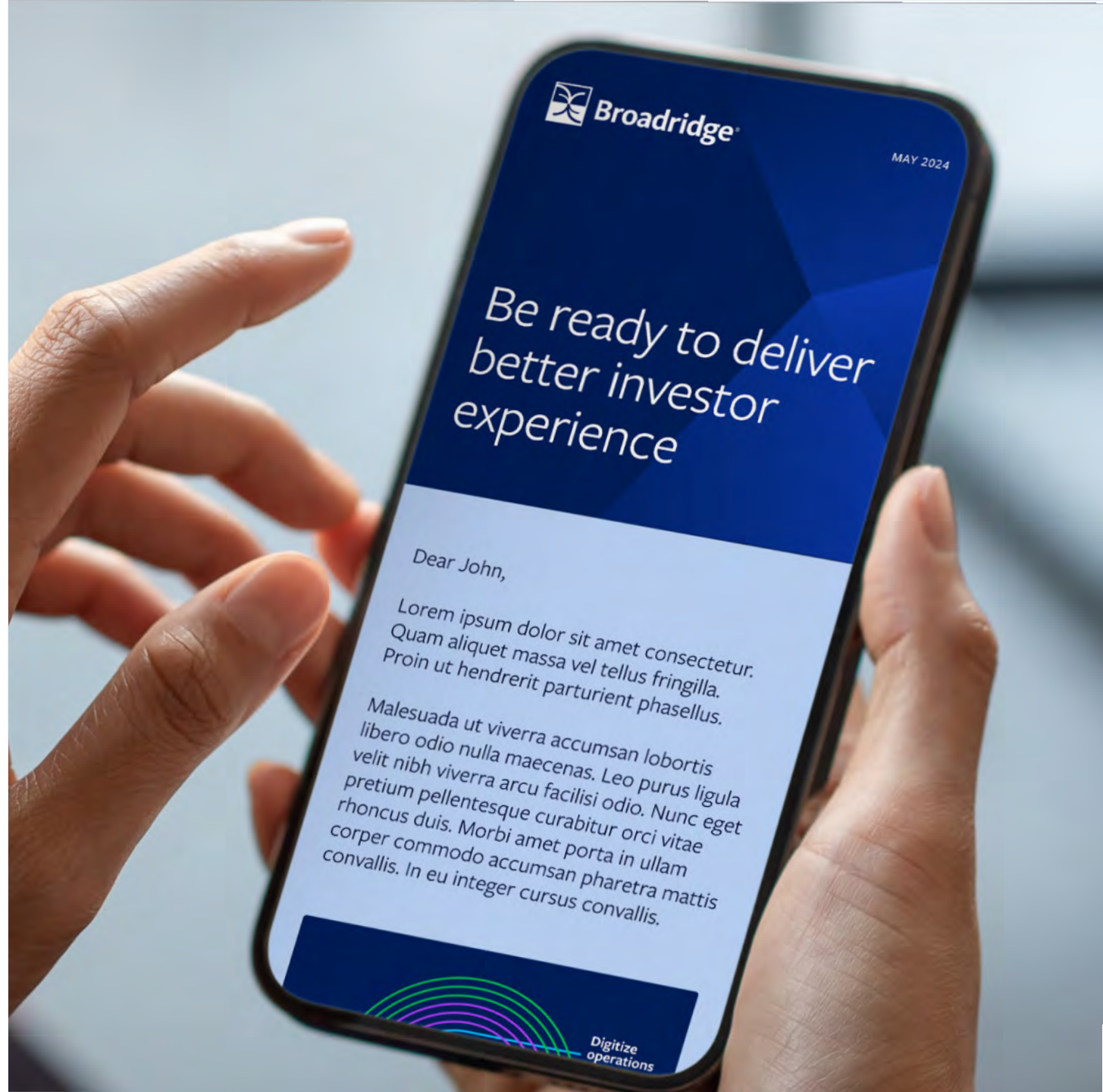
## Getting started

Visit [Our Brand](#) to download these and other files key to building our brand.

3.3 CHANNELS

# Email

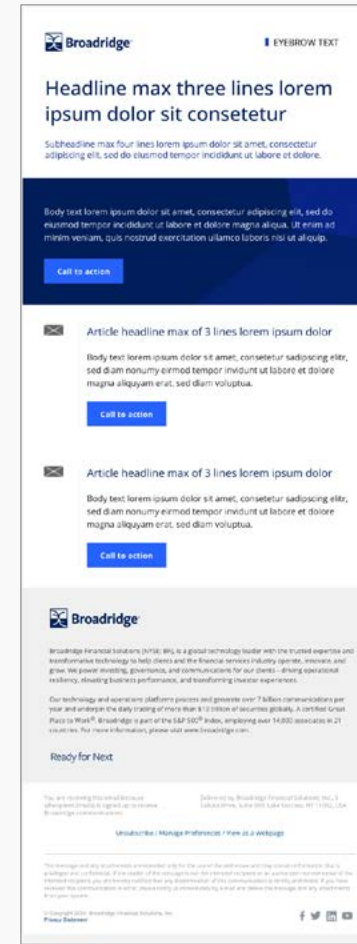
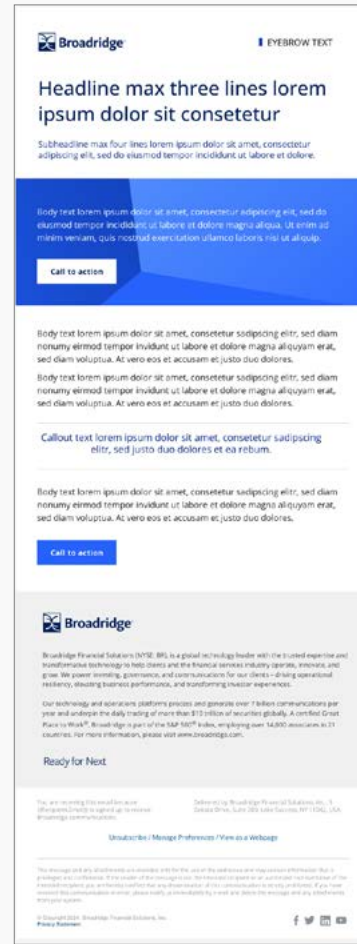
3.3.1.1 Overview



# Email

Emails are the backbone of marketing and communications.

Coming soon



## Getting started

Visit Our Brand to download these and other files key to building our brand.

3.3 CHANNELS

# Presentations

3.3.2.1 Overview



# Presentations

Simple, sophisticated slides create an impactful, coherent presentation.

Our presentation template pulls together the principles and elements of our brand components.

We use our palette of blues to create a proprietary look and feel that helps build our brand.

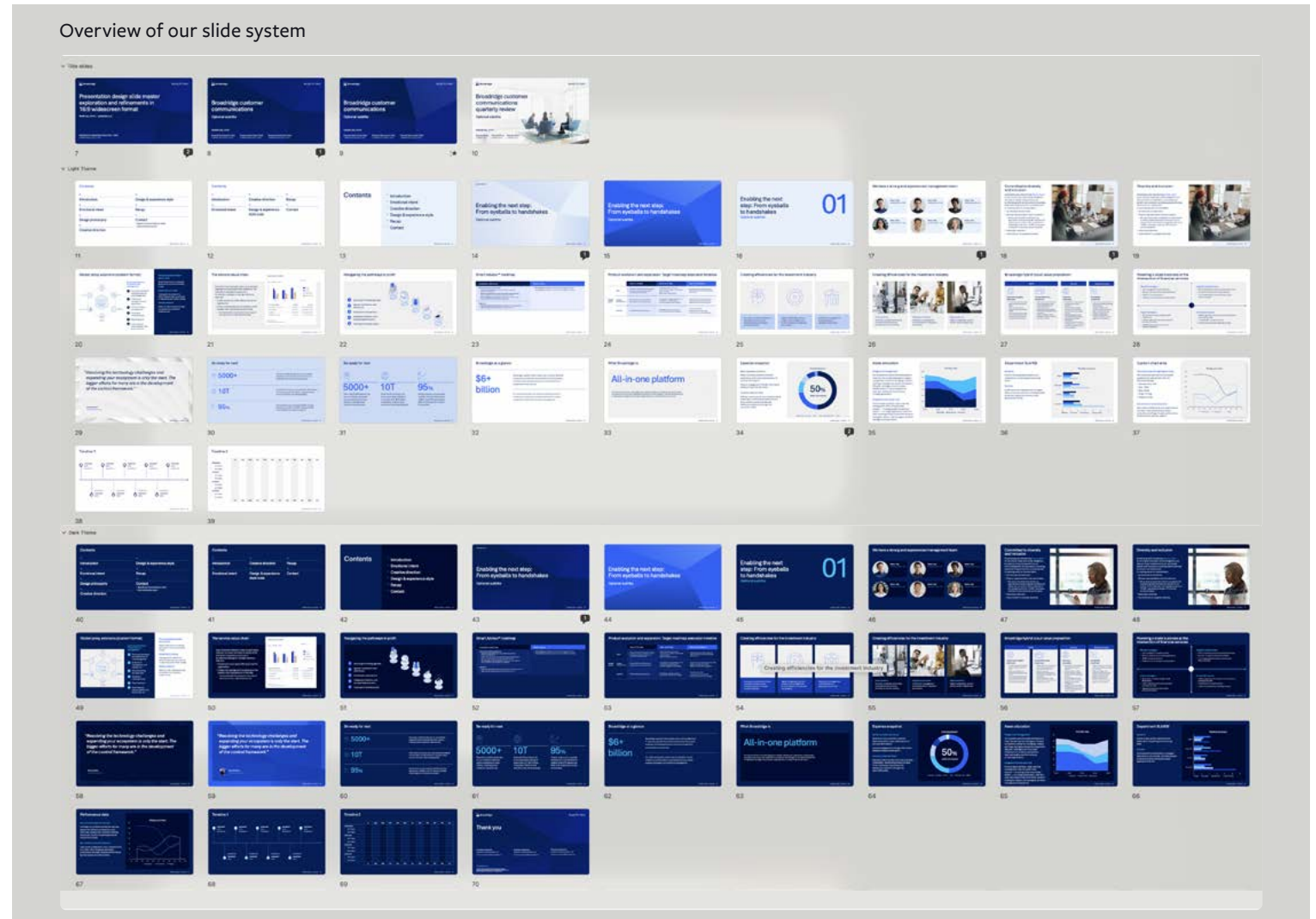
We prefer the light mode as our primary 'theme' and we've also provided a dark modes for major event presentations.

Clear typography, founded on our new word-processing font Aptos, helps us communicate efficiently and with greater impact.

Training, templates, and resources for migrating existing decks are being provided to support teams using PPT.

## Getting started

Visit [Our Brand](#) to download these and other files key to building our brand.



3.3 CHANNELS

# Events

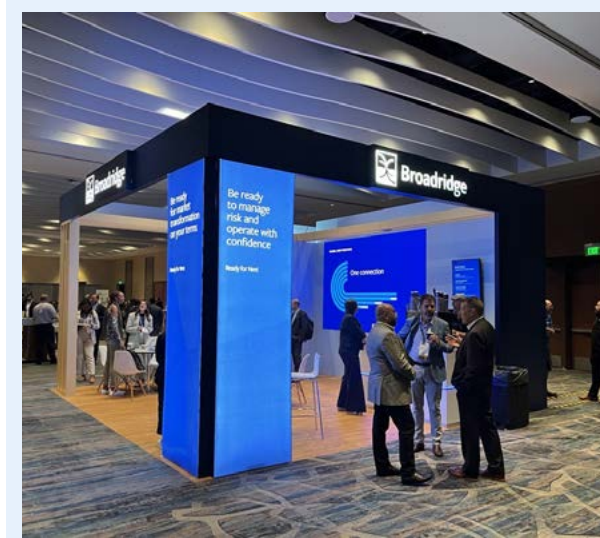
- 3.3.3.1 Events overview
- 3.3.3.2 Events resources



# Events overview

Now more than ever, in-person events are an impactful way to engage our current and future clients.

The Brand and Events Teams collaborate to ensure that the events experience is fully aligned with the Broadridge brand. Please reach out to them to help make any event deliver the brand experience.



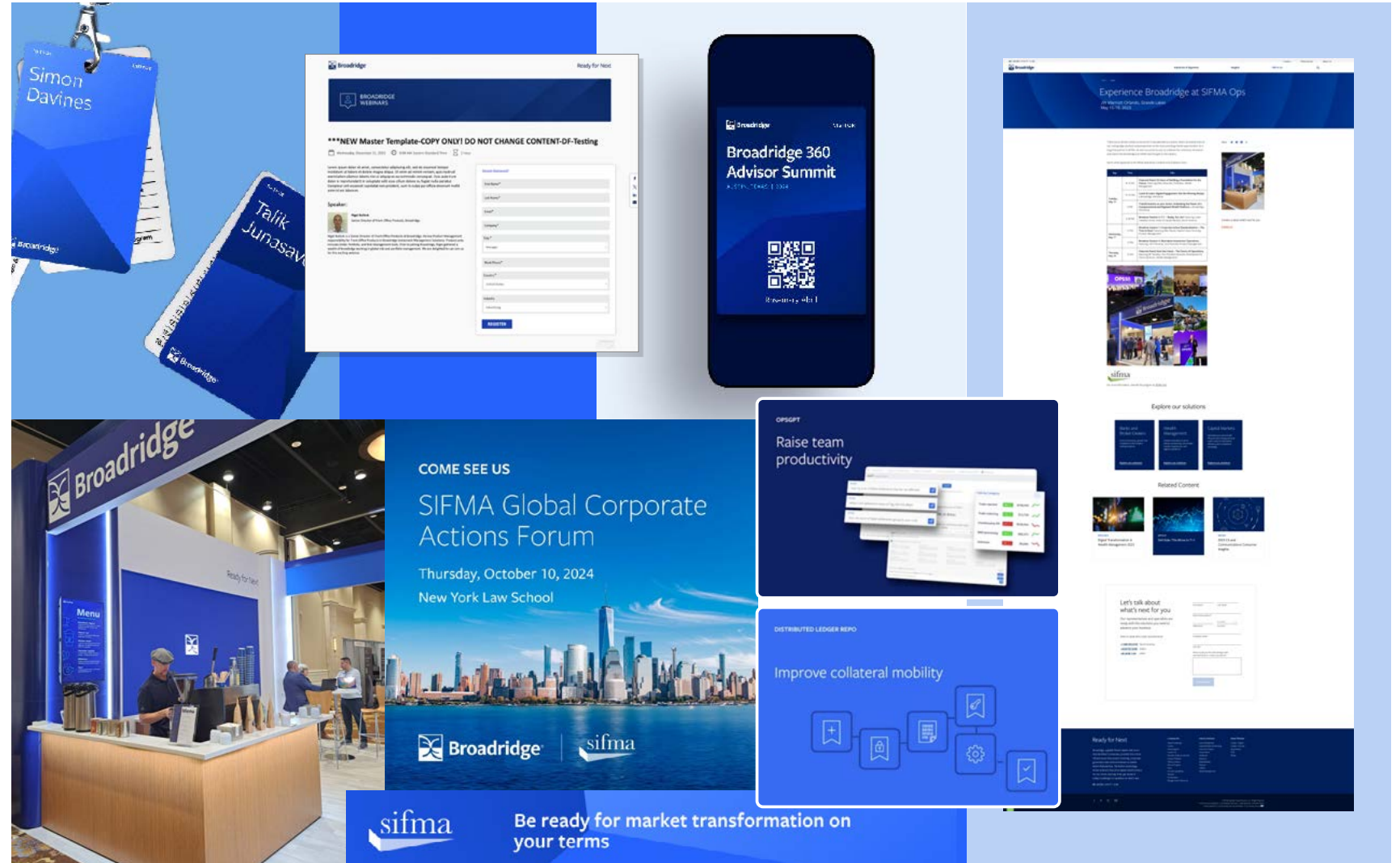
## Getting started

Visit Our Brand to download these and other files key to building our brand.

# Events resources

Materials for in-person events should incorporate our brand elements, including the logo, supergraphic, colors, and typography.

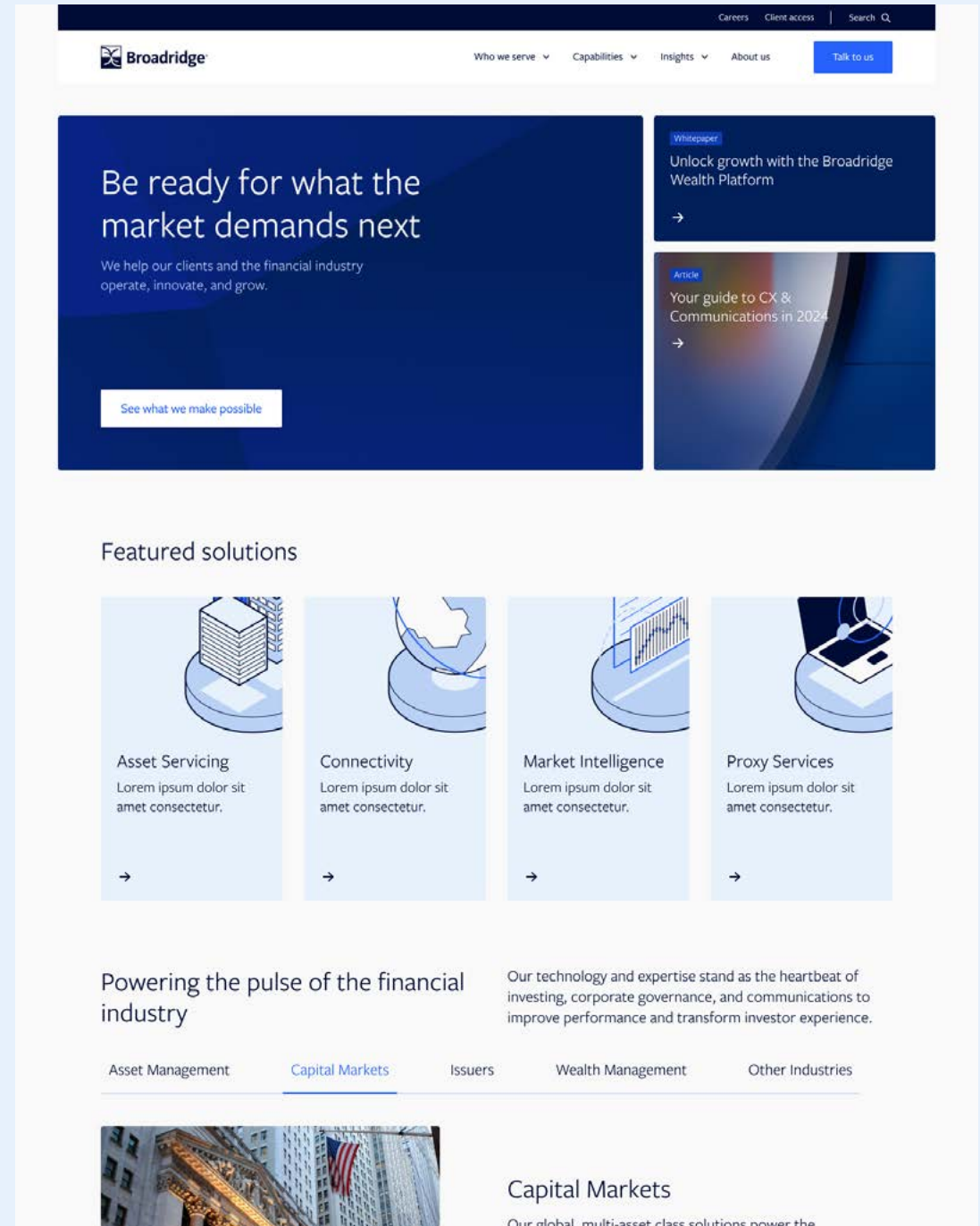
To make the most of the unique environment of these events, consider factors like textures, textiles, lighting, and seating to enhance the overall experience.



3.3 CHANNELS

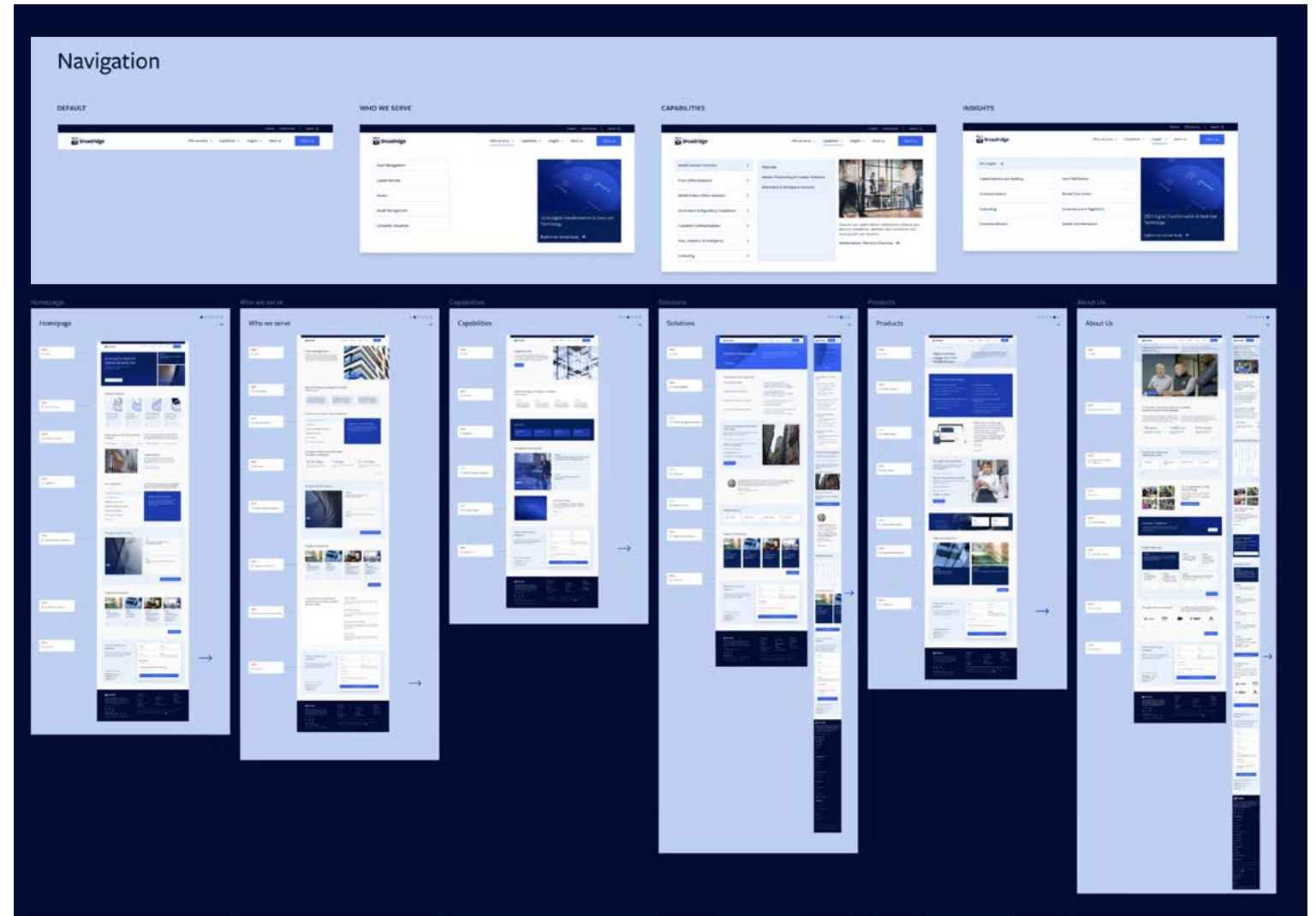
# Web

- 5.4.1 Web overview
- 5.4.2 Web resources



# Web overview

In FY Q3'25, a new Broadridge.com will launch, built on a new, modern, more flexible design system crafted according to these brand guidelines.



## Getting started

Visit our Our Brand to download these and other files key to building our brand.

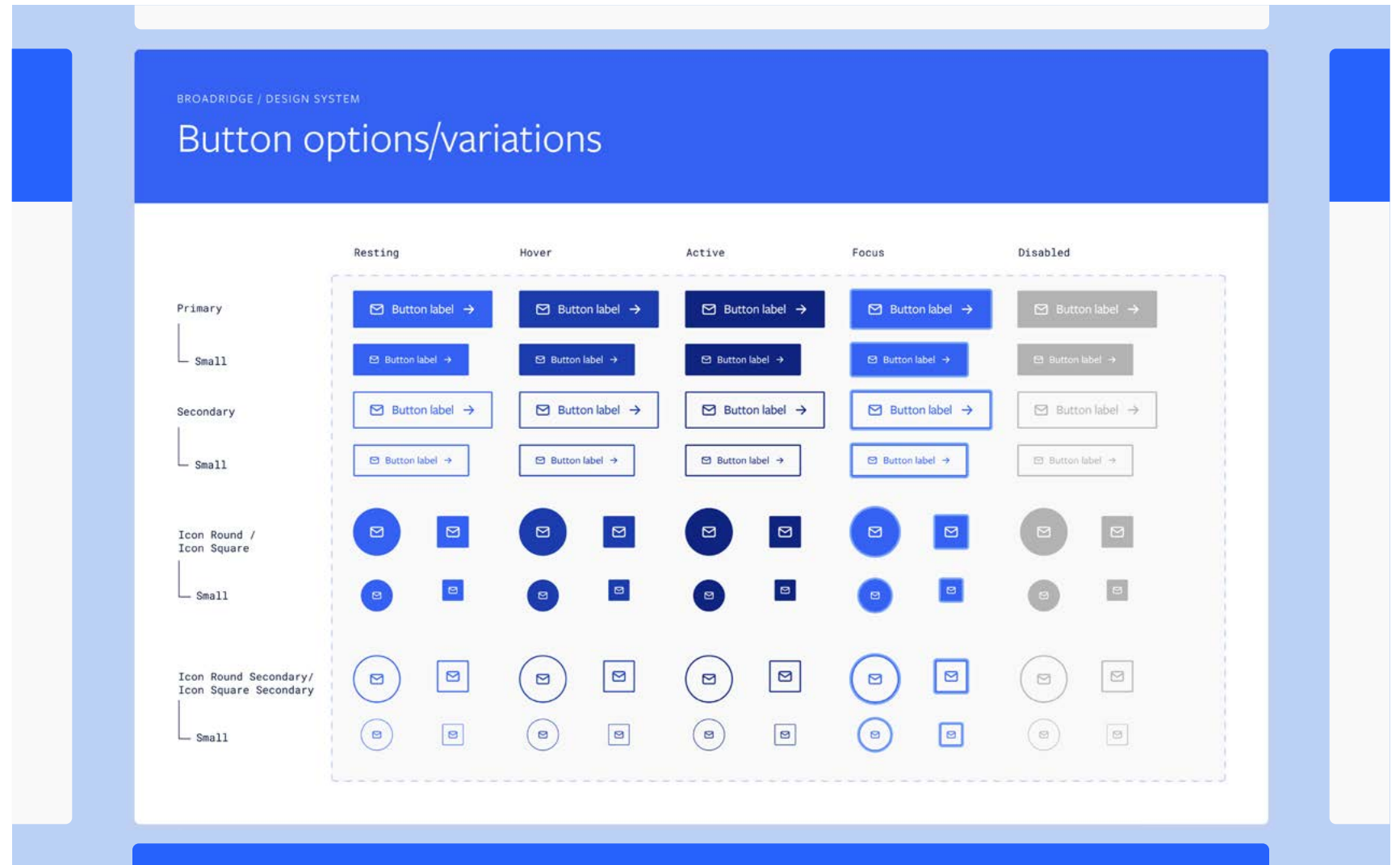
# Web resources

An extensive design system has been created to make building and expanding our website efficient and consistent.

Our webkit is built with Figma and can be provided upon request.

## Included in the Broadridge Webkit

- Foundational assets
- Components and modules
- Templates



3.3 CHANNELS

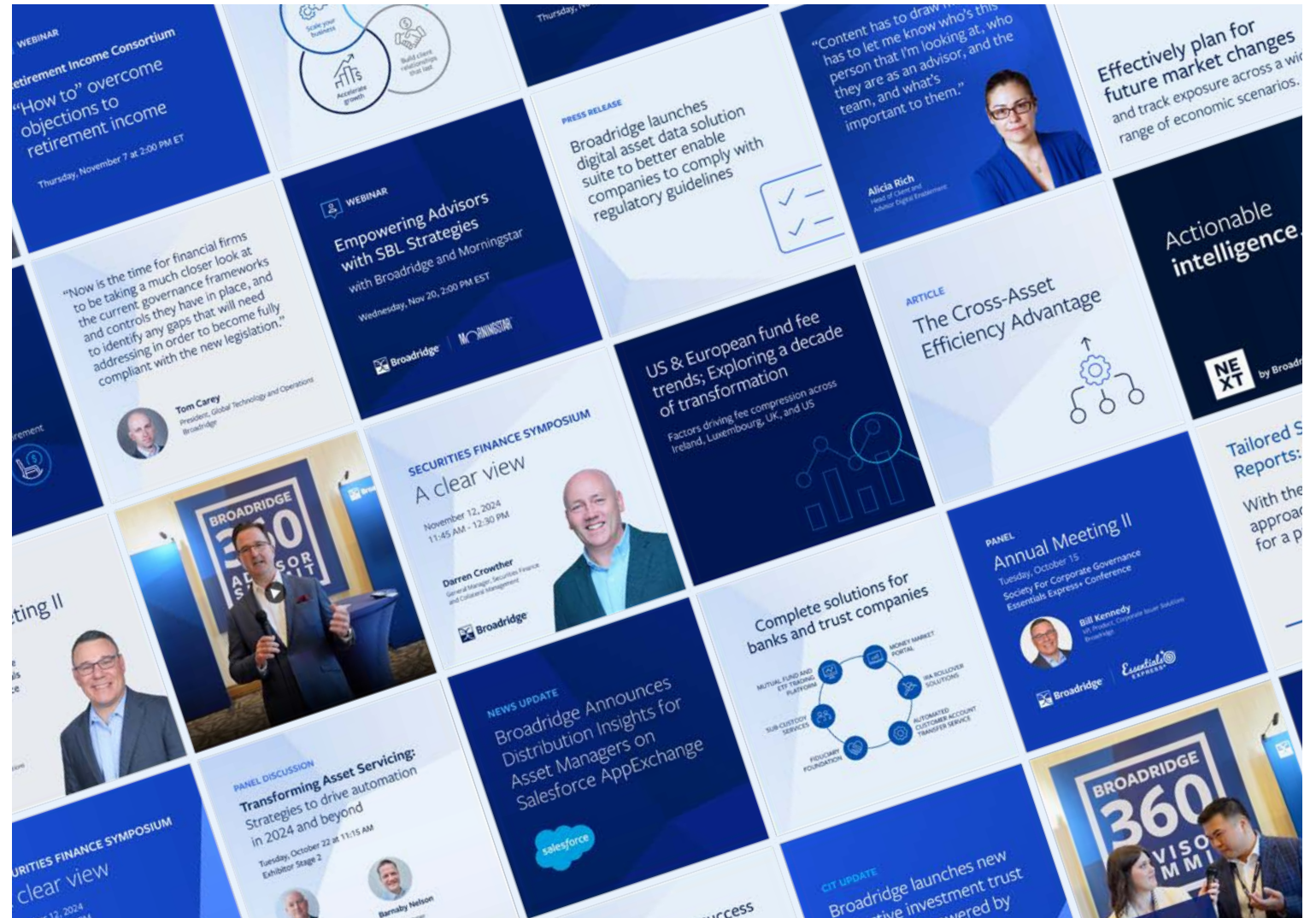
# Social

- 5.5.1 Social overview
- 5.5.2 Associate social media (LinkedIn) profile



# Social media overview

We're constantly fine-tuning our social media presence and our communications. From posts that support events to posts that announce new IP to sharing quotes from key Broadridge experts, our social communications templates dial in the right message to the right audience.



**Getting started**  
Visit our Our Brand page to download these and other files key to building our brand.

# Associate social media (LinkedIn) profile

To add a profile and banner image to your LinkedIn personal account, start by logging into LinkedIn and navigating to your profile page.

## For your profile picture

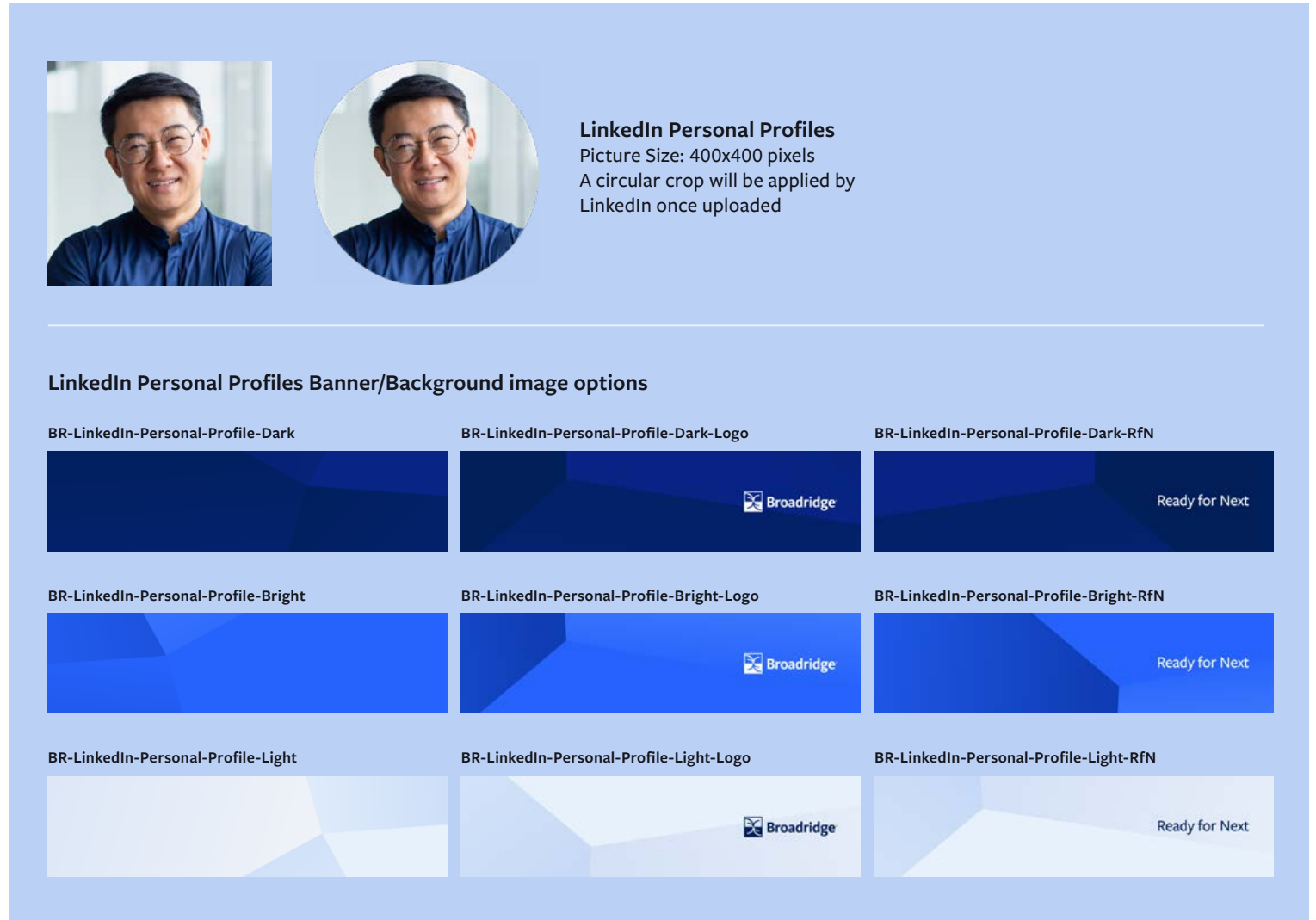
Click the camera icon on the profile photo area and upload an image sized 400 x 400 pixels for best quality. You can also use the Edit tool to adjust the crop if needed.

## For your banner or background photo

Click the camera icon on the banner area and select one of the nine images available on this page. You can download the images from this link. Once uploaded, please avoid adjusting the positioning within LinkedIn. Remember to save your changes to update your profile.

### Getting started

Visit our [Our Brand](#) page to download these and other files key to building our brand.



**LinkedIn Personal Profiles**  
Picture Size: 400x400 pixels  
A circular crop will be applied by LinkedIn once uploaded

**LinkedIn Personal Profiles Banner/Background image options**

BR-LinkedIn-Personal-Profile-Dark	BR-LinkedIn-Personal-Profile-Dark-Logo	BR-LinkedIn-Personal-Profile-Dark-RfN
BR-LinkedIn-Personal-Profile-Bright	BR-LinkedIn-Personal-Profile-Bright-Logo	BR-LinkedIn-Personal-Profile-Bright-RfN
BR-LinkedIn-Personal-Profile-Light	BR-LinkedIn-Personal-Profile-Light-Logo	BR-LinkedIn-Personal-Profile-Light-RfN

3.3 CHANNELS

# Collateral

5.6.1 Overview

EXECUTIVE SUMMARY

Capital markets firms globally are in a better position to invest in their future than at any time since the 2008 global financial crisis.

With rising interest rates, stronger economic prospects, to growing profits, and buoyant stock markets, banks can invest new technologies to secure their future. At the same time, they are struggling to achieve a return on equity that is higher than their cost of capital.

To overcome this challenge, banks have the opportunity to harness the promise of new technologies to reduce costs by mutualizing key functions to focus on growth that drives shareholder value.

JANE DOE, CFO



TECHNOLOGY IS KEY

Last year, Broadridge surveyed more than 150 buy and sellside equity analysts covering capital markets. That research revealed that banks had taken great strides to improve their developing business model and performance, but more aggressive action was needed.

Discussions with c-suite executives and middle managers since then confirm that imperative persists. But they see significant potential promise for a step change forward, based on the use of three transformational new technologies:

1. CLOUD COMPUTING
2. AI, MACHINE LEARNING & ROBOTICS TECHNOLOGY
3. DISTRIBUTED LEDGER TECHNOLOGY (BLOCKCHAIN)

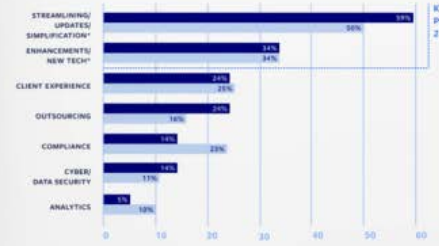
HOW IS THE INDUSTRY RESPONDING?

Broadridge and Greenwich Associates followed up by conducted new research, surveying executives at 69 capital markets firms.

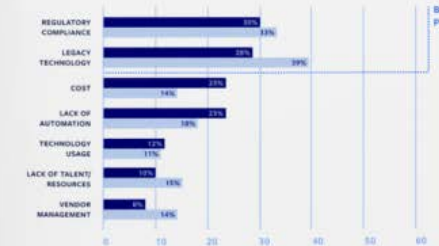
Nearly every large institution is now engaging in full-scale effort to move large portions of infrastructure to the cloud. These efforts encompass hundreds of applications.

Re-factoring applications to take full advantage of cloud capabilities is a major work effort. Third-party software-as-a-service (SaaS) can address significant portions of this effort. Offloading parts of the application portfolio to strong third-party solutions exist. Partnerships across multiple clients for a shared function can apply this technology more effectively.

Q: WHAT ARE YOUR TOP TWO KEY TECHNOLOGY-RELATED PRIORITIES FOR THE NEXT 12 TO 24 MONTHS?



Q: WHAT ARE YOUR 2-3 BIGGEST PAIN POINTS RELATED TO OPERATIONS?



# Collateral

Word templates, whitepapers, brochures, and sell sheets help us go deep on thought leadership, our capabilities, and our solutions.



**Getting started**  
Visit Our Brand to download these and other files key to building our brand.

3.3 CHANNELS

# Stationery

- 5.7.1 Overview
- 5.7.2.1 Business cards
- 5.7.2.2 Business card ordering
- 5.7.3 Email signature
- 5.7.4 Letterheads



# Stationery overview

Our stationery ranges from printed material to digital templates.

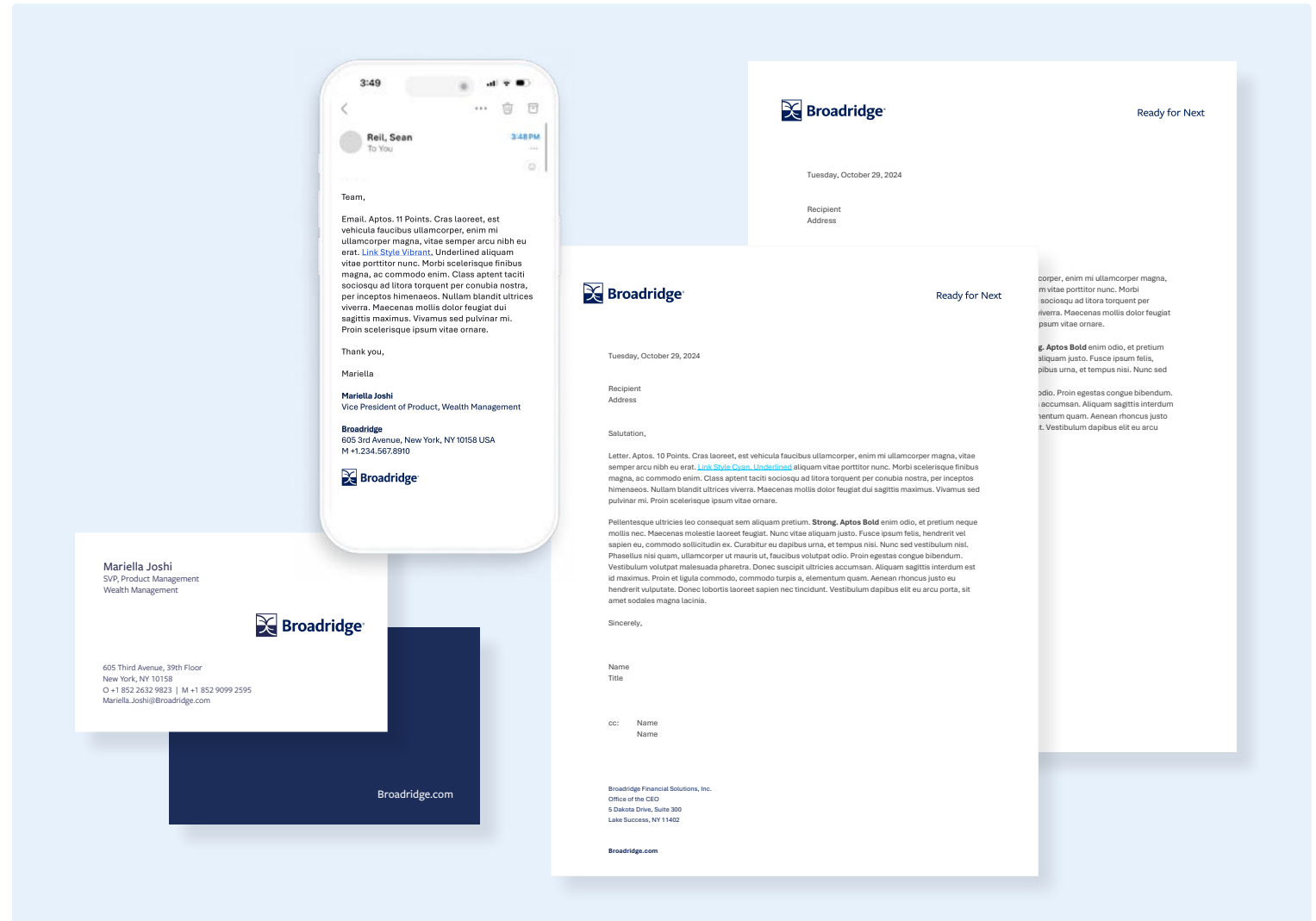
When all associates use the same template, it sends a powerful message to the world that we are a unified company with a shared vision.

## Available stationery

- Business cards
- Email signature
- Letterhead

### Getting started

Visit Our Brand to download these and other files key to building our brand.



# Business cards

Our business cards have been updated to our new brand style. Associates who regularly represent Broadridge externally with clients, vendors, strategic partners, media and other stakeholders are encouraged to order new cards.

Templates are available for:

- North America
- Europe
- Asia

To order business cards, please review the next page.

## Getting started

Visit Our Brand to download these and other files key to building our brand.

### Non-U.S. associates

The following templates have been created for use with local vendors.

#### Paper specifications

130# card stock, uncoated

#### Color specification

2-color front: PMS 2757 and black

1-color back: PMS 2757C

#### Varnish specification

Matte UV Stampable overprint, varnish (JZW257) on the back of the card to seal the sheet and avoid color rub off

#### Font specification

Adobe Freight Sans Pro (weights below)

##### Front

Name: Semi-Bold, 10pt;

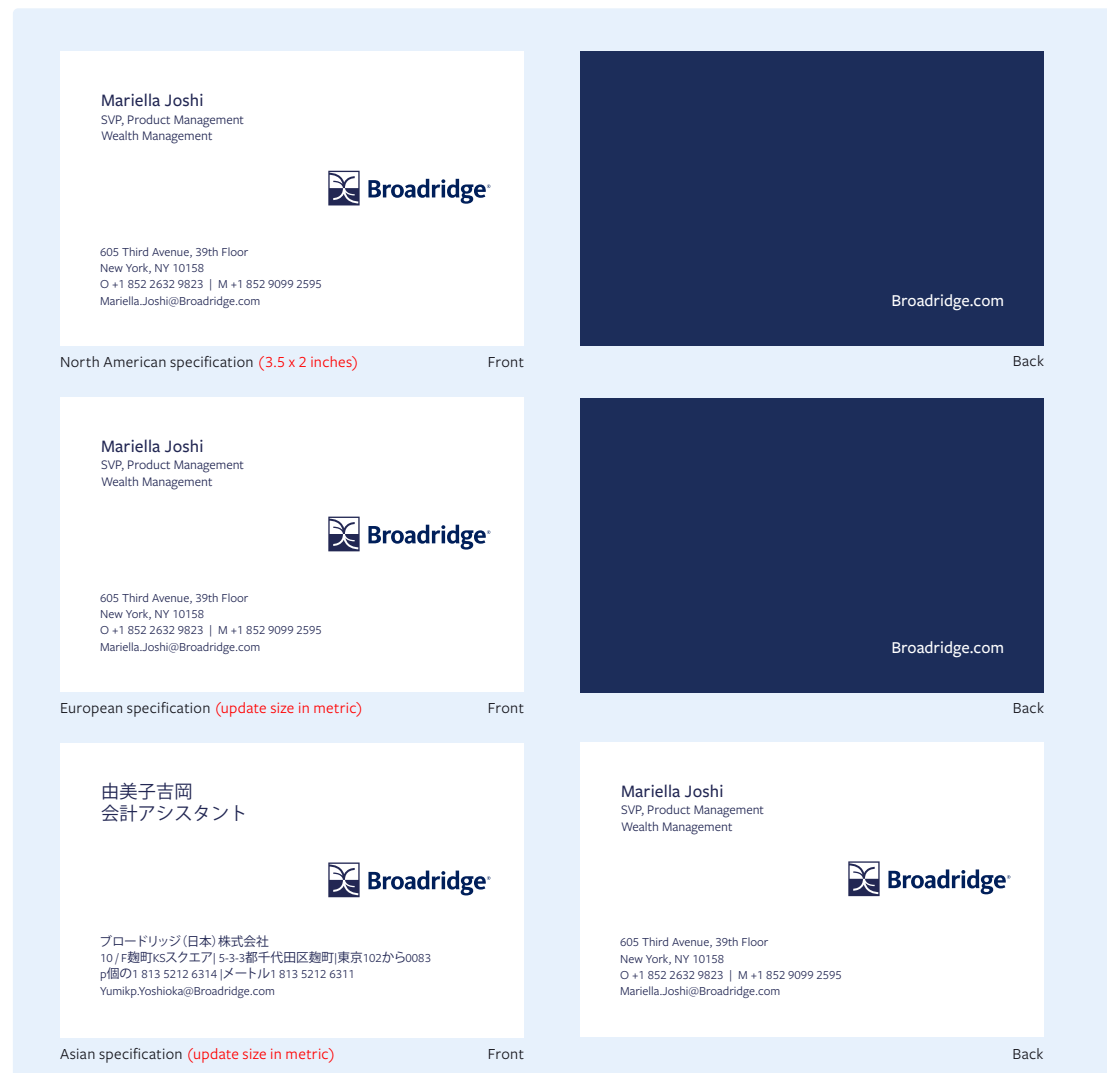
Title: Book, 7.5pt;

Bottom text: Book, 7pt

##### Back

URL: 9pt;

Bottom text: Book, 6.5pt



# Business card ordering

## U.S. & North America

1. Go to MyBroadridge
2. Locate Oracle Cloud ERP and login with Single Sign On
3. On the dashboard select Procurement then Purchase Requisitions
4. In the Category drop down menu select Office Supplies & Furniture
5. Select Dupli Punchout
6. In the top navigation select Create Order then Broadridge or LTX
7. Select the business card or stationery item and complete the order form by entering your contact information

## EMEA

*To come*

## AsiaPac

*To come*

# Email signature

When all associates use the same template, it sends a powerful message to the world that we are a unified company with a shared vision.

## Available resources

[Broadridge email signature guide](#) 

## Dos/Don'ts

**Do** change your default font in Outlook to Aptos

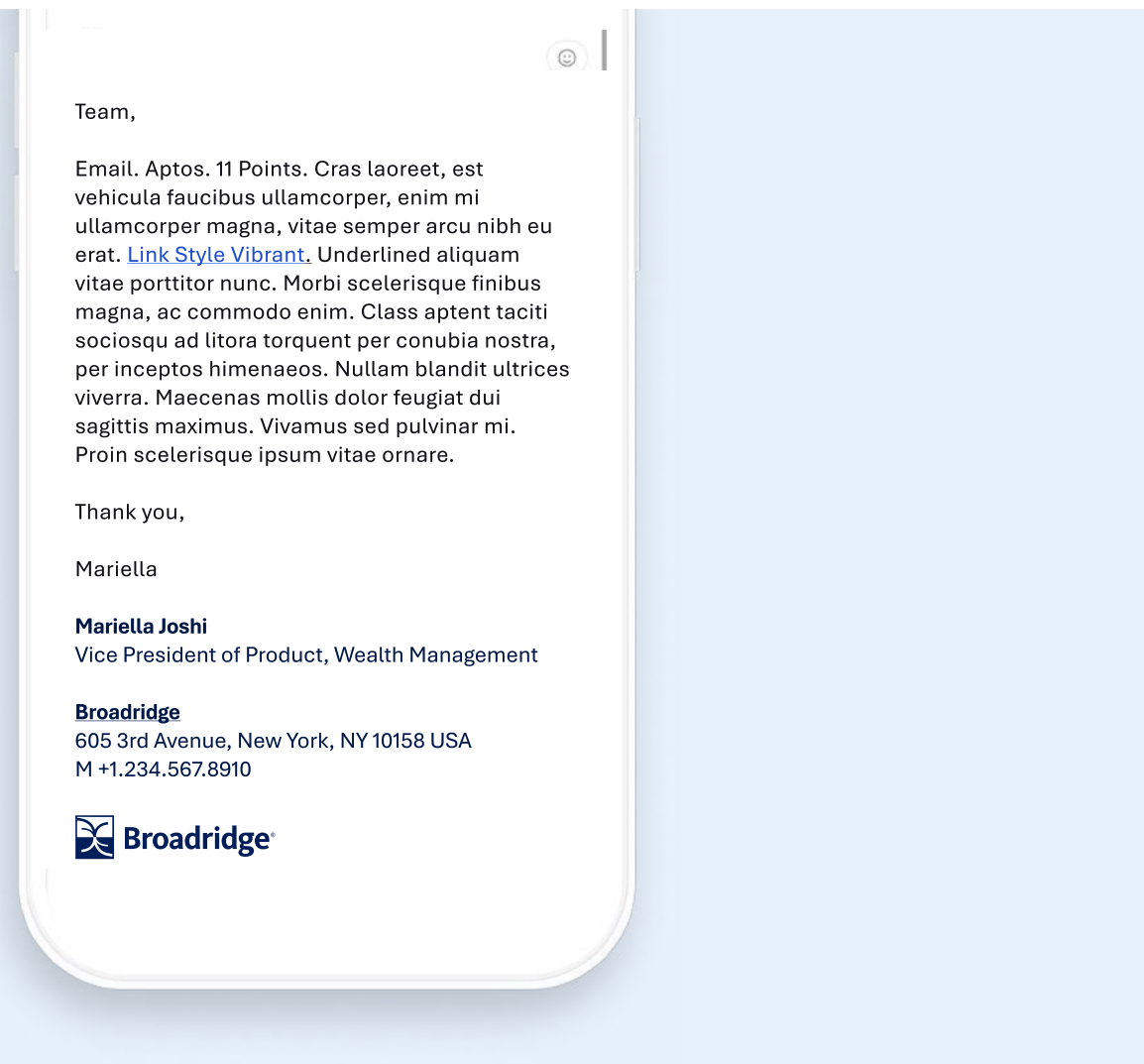
**Do** use the Broadridge email signature implementation guide to apply your email signature

**Don't** use unapproved signature templates

**Don't** add additional colors, graphics, or copy lines to your email signature or modify the layout

## Getting started

Visit [Our Brand](#) to download these and other files key to building our brand.



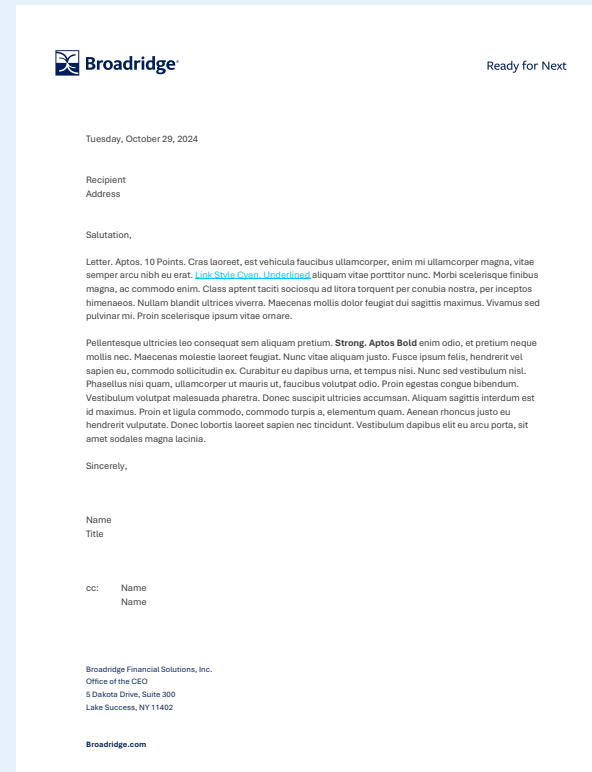
# Letterheads


Our letterhead is available in both US letter and ISO/A4 formats.

The bottom address line is editable, please be sure to update with your office's location.

**Important:** Letterhead is corporate stationery and should only be used for official business communications.

## US letter



 **Broadridge** Ready for Next

Tuesday, October 29, 2024

Recipient  
Address

Salutation,

Letter. Aptos. 10 Points. Cras laoreet, est vehicula faucibus ullamcorper, enim mi ullamcorper magna, vitae semper arcu nibh eu erat. [Link Style Cyan, Underlined](#) aliquam vitae porttitor nunc. Morbi scelerisque finibus magna, ac commodo enim. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Nullam blandit ultrices viverra. Maecenas mollis dolor feugiat dui sagittis maximus. Vivamus sed pulvinar mi. Proin scelerisque ipsum vitae ornare.

Pellentesque ultricies leo consequat sem aliquam pretium. **Strong. Aptos Bold** enim odio, et pretium neque mollis nec. Maecenas molestie laoreet feugiat. Nunc vitae aliquam justo. Fusce ipsum felis, hendrerit vel sapien eu, commodo sollicitudin ex. Curabitur eu dapibus urna, et tempus nisi. Nunc sed vestibulum nisi. Phasellus nisi quam, ullamcorper ut mauris ut, faucibus volutpat odio. Proin egestas congue bibendum. Vestibulum volutpat malesuada pharetra. Donec suscipit ultrices accumsan. Aliquam sagittis interdum est id maximus. Proin et ligula commodo, commodo turpis a, elementum quam. Aenean rhoncus justo eu hendrerit vulputate. Donec lobortis laoreet sapien nec tincidunt. Vestibulum dapibus elit eu arcu porta, sit amet sodales magna lacinia.

Sincerely,

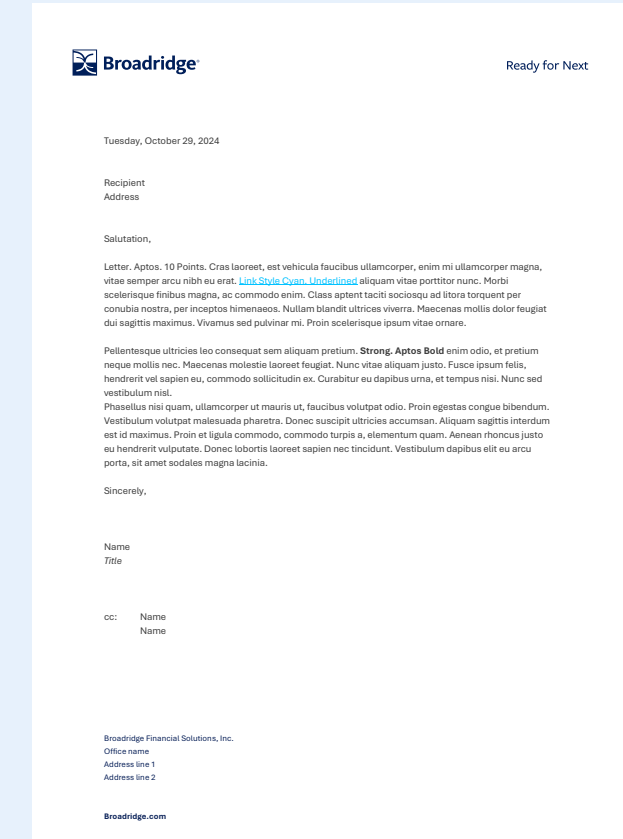
Name  
Title


cc: Name  
Name

Broadridge Financial Solutions, Inc.  
Office of the CEO  
5 Dakota Drive, Suite 300  
Lake Success, NY 11402

[Broadridge.com](#)

## ISO/A4



 **Broadridge** Ready for Next

Tuesday, October 29, 2024

Recipient  
Address

Salutation,

Letter. Aptos. 10 Points. Cras laoreet, est vehicula faucibus ullamcorper, enim mi ullamcorper magna, vitae semper arcu nibh eu erat. [Link Style Cyan, Underlined](#) aliquam vitae porttitor nunc. Morbi scelerisque finibus magna, ac commodo enim. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Nullam blandit ultrices viverra. Maecenas mollis dolor feugiat dui sagittis maximus. Vivamus sed pulvinar mi. Proin scelerisque ipsum vitae ornare.

Pellentesque ultricies leo consequat sem aliquam pretium. **Strong. Aptos Bold** enim odio, et pretium neque mollis nec. Maecenas molestie laoreet feugiat. Nunc vitae aliquam justo. Fusce ipsum felis, hendrerit vel sapien eu, commodo sollicitudin ex. Curabitur eu dapibus urna, et tempus nisi. Nunc sed vestibulum nisi. Phasellus nisi quam, ullamcorper ut mauris ut, faucibus volutpat odio. Proin egestas congue bibendum. Vestibulum volutpat malesuada pharetra. Donec suscipit ultrices accumsan. Aliquam sagittis interdum est id maximus. Proin et ligula commodo, commodo turpis a, elementum quam. Aenean rhoncus justo eu hendrerit vulputate. Donec lobortis laoreet sapien nec tincidunt. Vestibulum dapibus elit eu arcu porta, sit amet sodales magna lacinia.

Sincerely,

Name  
Title

cc: Name  
Name

Broadridge Financial Solutions, Inc.  
Office name  
Address line 1  
Address line 2

[Broadridge.com](#)

### Getting started

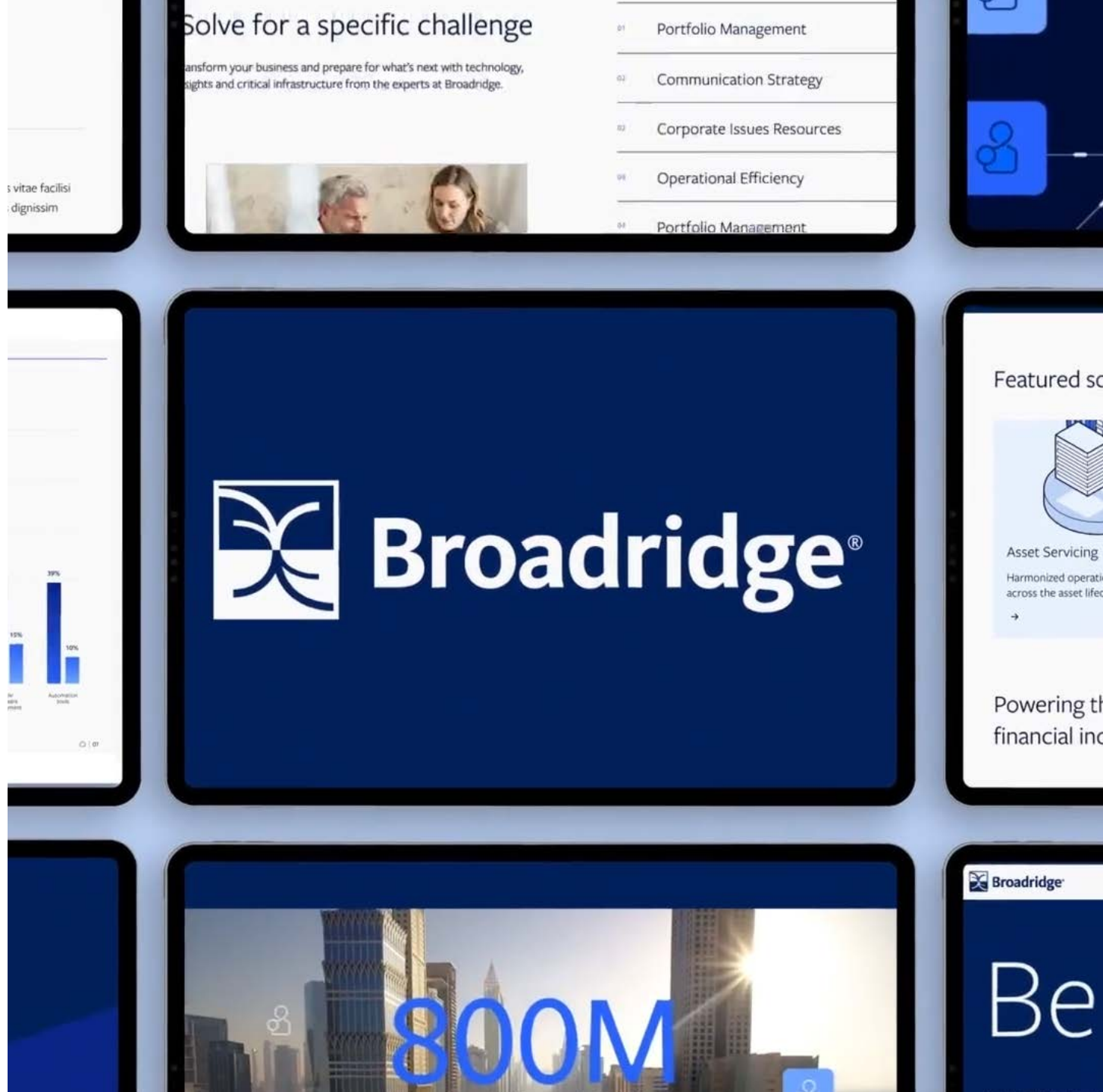
Visit Our Brand to download these and other files key to building our brand.

3.3 CHANNELS

# Motion

- 5.8.1 Motion overview
- 5.8.2 Available resources

**Getting started**  
Visit Our Brand to download these and other files key to building our brand.

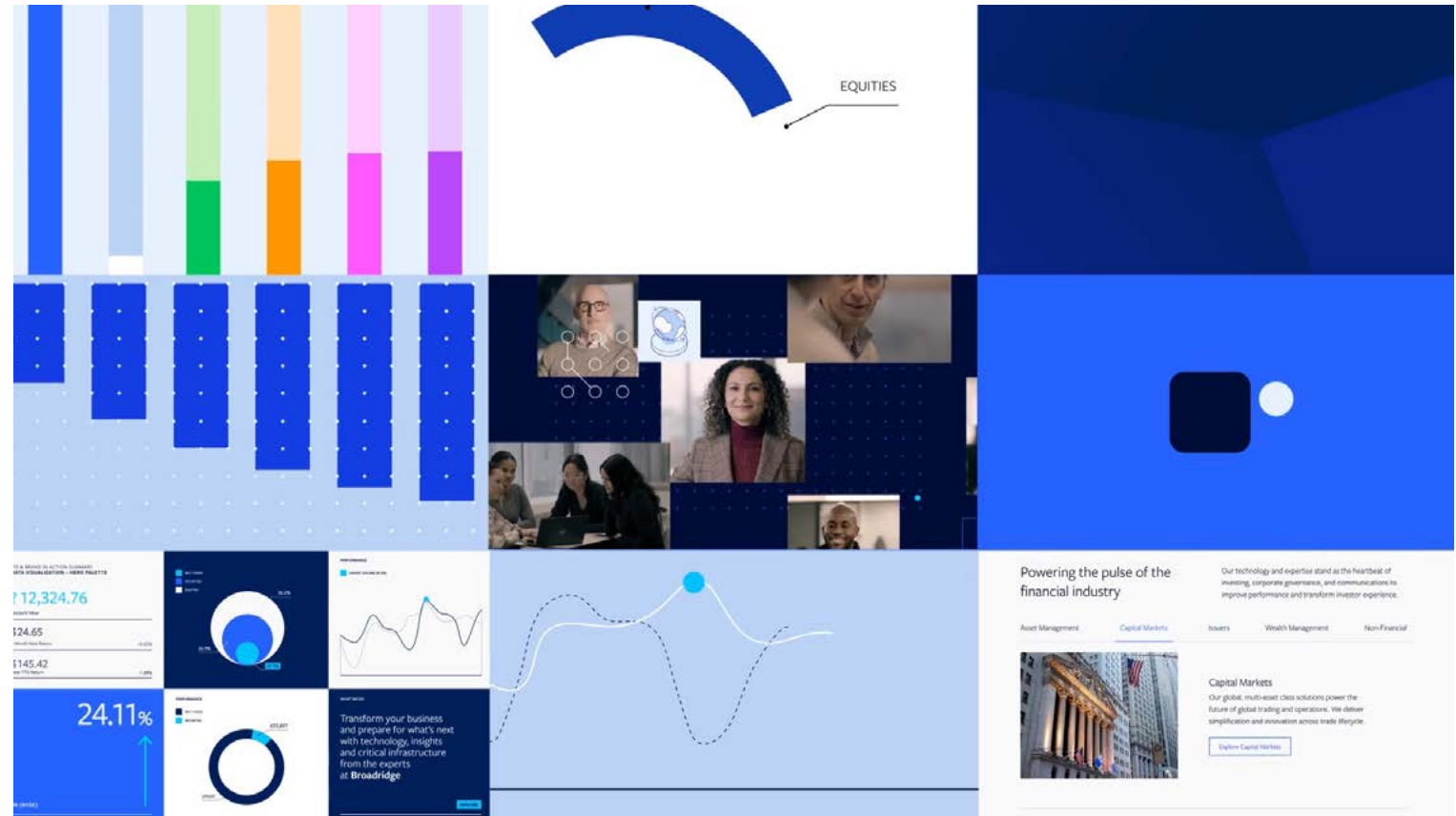


# Motion overview

The motion system extends the expression and functionality of the design system.

Informed by Broadridge's three creative principles, these pillars are our essential guides for creating cohesive, impactful motion design. They should all be used together when crafting animations and creating video.

Our motion is purposeful and controlled. Our tone is intentional and fluid. Simple movements create a clear and calm foundation. Typography, messaging, photography, video and other content should subtly arrive into frame, reinforcing our fluid and intentional growth.



## Sophisticated simplicity

Our motion implies intellectual sophistication and clear organization.

## Purposeful momentum

Movement is purposeful and controlled.

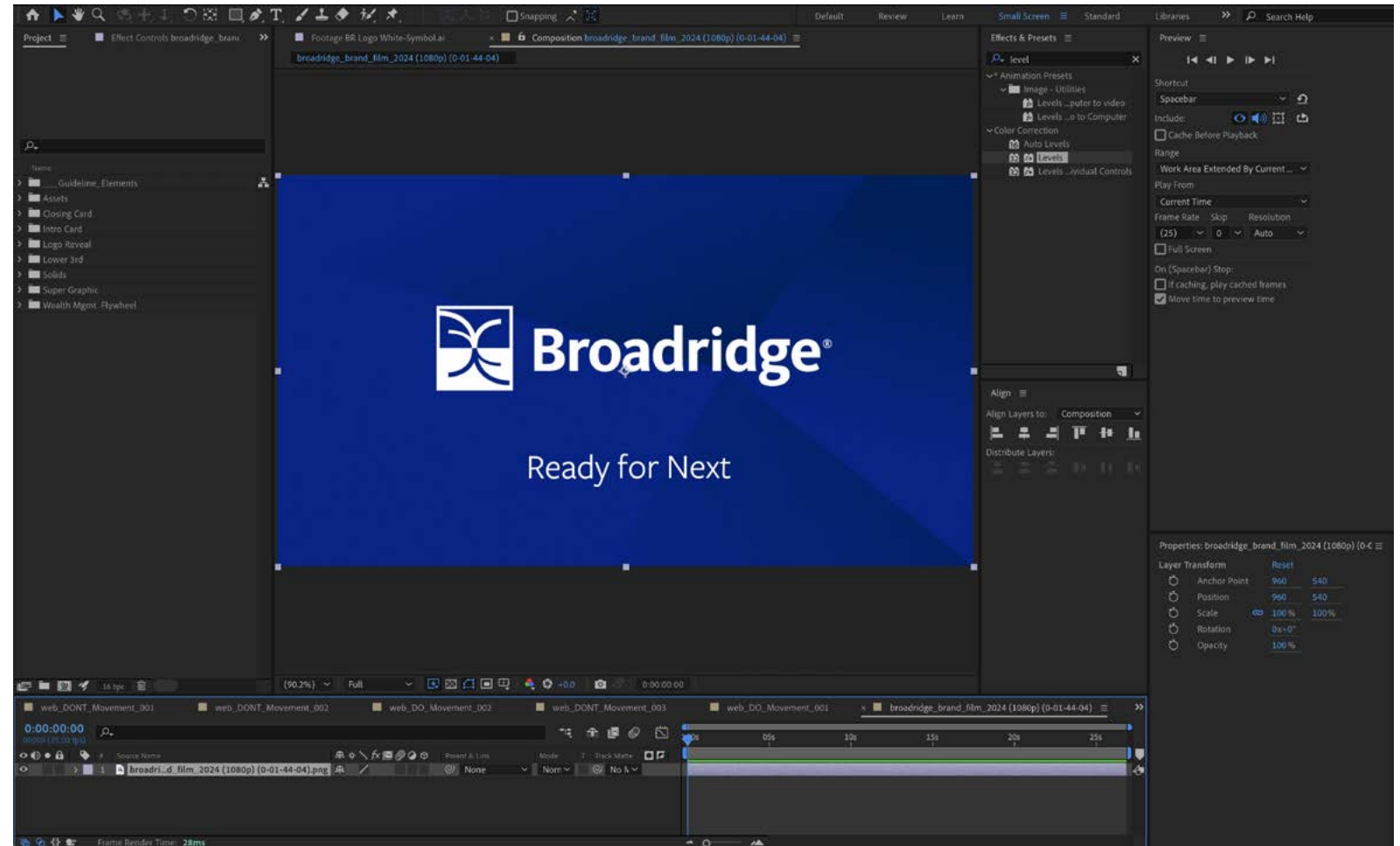
## Warm intelligence

Expressing approachability and ease through simple movements that clearly express intention.

# Available resources

Materials for motion and video should incorporate all our brand elements, including the logo, supergraphic, colors, and typography..

Additionally, due to the unique medium of video, consider factors like talent framing, lighting, background, music, audio, graphical elements, and composition to enhance the overall aesthetic quality.



# 4.0 Verbal expression

- 6.1 Our tone of voice
- 6.2 Our company description
- 6.6 Writing style
- 6.7 Our clients

# Our tone of voice

Tone of voice is the manner in which a brand speaks. It brings life to the brand by making it feel human and relatable.

## **Tone of voice**

Our tone of voice is reflective of and consistent with our brand's essence: trusted and transformative.

We move our clients' businesses forward in powerful and lasting ways, but always do so responsibly and safely. If we are providing a solution, clients can trust it and rely on it to deliver.

**Trusted** represents the foundation Broadridge has built over decades of delivering accurately and dependably for our clients. It draws on our deep industry expertise as well as the security and stability we bring to our clients as we continue to deliver intelligent solutions with the utmost diligence and compliance.

**Transformative** speaks to our adaptability, forward-thinking, and level of innovation that affects change and solves the problems of today and tomorrow.

## **How we speak**

Our voice should build trust in our knowledge and expertise and speak in a manner that always places our clients, and our benefits to them, first.

We are expert leaders, knowledgeable and confident in our approach, but always thoughtful and inclusive. We speak in the voice of partners – working with our clients to solve their most important challenges.

Our voice is also reflective of our values – engaged, accountable, with an entrepreneurial mindset. We are problem solvers, always, on behalf of our clients.

We speak in a manner that is clear, concise and direct. We display a deep understanding of the challenges our clients face and distill complex topics into simple takeaways.

While we seek to engage our audience with a forward-looking view, we balance this against the pragmatic needs of our clients and provide tangible benefits.

We are never boastful or salesy, but we do not shy away from our scale and tangible proof that provide trust in our capabilities.

# Our company description

## Short

Broadridge is a global technology leader with the **trusted expertise** and **transformative technology** to help clients and the financial services industry **operate, innovate,** and **grow**. We power investing, governance, and communications for our clients—driving operational resiliency, elevating business performance, and transforming investor experiences.

## Long

**Broadridge Financial Solutions (NYSE: BR)** is a global technology leader with the trusted expertise and transformative technology to help clients and the financial services industry operate, innovate, and grow. We power investing, governance, and communications for our clients—driving operational resiliency, elevating business performance, and transforming investor experiences.

Our technology and operations platforms process and generate over 7 billion communications per year and underpin the daily trading of more than \$10 trillion of securities globally. A certified Great Place to Work<sup>®</sup>, Broadridge is part of the S&P 500<sup>®</sup> Index, employing over 14,000 associates in 21 countries.

# Writing style

We follow the AP Stylebook, Webster's II New College Dictionary—and the Broadridge writing style guide.

The styles in the Broadridge writing style guide do not override text that is directly copied from a third-party source, depicting any proper names, or subject to legal or historical specifications.

## Do

- Dive straight into the point at the beginning of the article—give the reader an immediate sense of what they're reading about (as well as why they should read)
- Use clear, concise sentences and paragraphs that are easy to read and understand
- Use bullet points and subheadings to break up your content and make it more digestible
- Provide data-driven insights and analysis to support your arguments
- Use a neutral, objective tone that presents the facts in a clear and concise manner
- Focus on providing actionable insights and recommendations for your readers
- Use a formal, professional tone that is appropriate for your audience
- Provide real-world examples to help illustrate your points

## Don't

- Use overly complex language or jargon that might be difficult for your readers to understand
- Use a biased or overly promotional tone that might undermine your credibility
- Ramble or go off-topic. Stick to your main point and make sure your writing is focused and concise
- Use overly long or convoluted sentences that might confuse your readers
- Use a casual or informal tone that might be inappropriate for your audience
- Overuse adjectives or adverbs that might make your writing sound overly flowery or pretentious
- Make unsupported claims or present data that is not properly sourced

## Stylistic Choices/Tone

- Use data-driven analysis and insights to support your arguments
- Provide real-world examples and case studies to help illustrate your points
- Use a neutral, objective tone that presents the facts in a clear and concise manner
- Focus on providing actionable insights and recommendations for your readers
- Use a clear and concise writing style that is easy to read and understand
- Avoid making unsupported claims or presenting data that is not properly sourced

# Our clients

The breadth and depth of clients we serve each and every day—who they are, the business they are in, and what they care about.

**We are a trusted partner to the world's leading companies and global financial markets.**

Broadridge serves many of the world's best-known corporations and financial firms who all play a pivotal role in the global economy across capital markets, wealth and asset management, and corporate governance.

**Our clients are senior decision makers and leaders across a wide range of roles and areas of expertise who all put their trust in us.**

**Operations and technology leaders**

**What they care about**

Harnessing technology innovation to transform customer experiences, modernizing their platforms to drive operational efficiencies, enhancing cybersecurity and resilience, and gaining data insights for competitive advantage.

**Regulatory and compliance leaders**

**What they care about**

Managing risk, meeting regulatory and disclosure requirements while mitigating impact of change, and communicating effectively with regulators, industry analysts, and investors to enable informed, timely decision-making.

**Business heads and C-suite**

**What they care about**

Driving strategic growth and expansion, increasing profit, reducing cost, mitigating all forms of risk, streamlining processes, improving the customer experience, and gaining market share.



**For Brand FAQs**

<https://broadridge.sharepoint.com/sites/Brand>

**For all Brand assets, templates, and guidelines**

<https://broadridge.sharepoint.com/sites/Brand>

**For general inquiries**

[BrandInfo@Broadridge.com](mailto:BrandInfo@Broadridge.com)

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Global Head of Brand and Digital Marketing

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Vice President, Design

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**Sara Norton**

Senior Director, Brand

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**Sabrina Markham**

Manager, Brand & Digital Marketing

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