



Market and communicate your expertise

AdvisorStream & MyCMO

Learn more about using our content marketing platforms for your business:

- Access extensive libraries of how-to articles and best-practice resources
- Orientation videos help you get set up and marketing quickly and easily



*The most successful professionals touch base with their clients 28 or more times a year!**

Simply put, using these tools makes reaching that number more manageable & realistic.



Engage with your clients and prospects using Broadridge's robust, turn-key content marketing portal with private label capabilities, contact management, pre-approved client newsletters, social media assistance, and more!



This marketing platform by FMG offers a centralized digital hub to execute marketing efforts in a scalable yet personalized manner. MyCMO includes unique content collections created specifically for Osaic representatives.

AdvisorStream details



Compliance-approved digital options and downloadable articles to support your business building efforts.

- Extensive library of finance and lifestyle articles and videos
- Omni-channel posting to social media, websites, and more
- Curated monthly client newsletters
- Market summaries & alerts
- Lead-optimized landing pages
- AI-powered insights on your contacts
- Premium upgrade option for content from recognized journalists and publications
- Integrated compliance workflow
- Add your own in-house content

MyCMO products & tools



Connect with clients and enhance relationships through pre-approved and customizable content such as:

- Email campaigns featuring financial and lifestyle content
- Automatic social media posting
- Printed greeting cards mailed for you
- Turnkey event kits and promotion materials
- Downloadable guides and ebooks for financial professional and client education
- Osaic & Ladenburg market updates
- Built-in compliance workflow
- Marketing performance & open rates reporting
- Upgrade to additional automation tools and monthly market insights

**As cited in Investment News.*

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