



# AdvisorStream FAQ

## AdvisorStream FAQ

### Q: What is AdvisorStream?

**A:** Broadridge's AdvisorStream is an AI-powered digital marketing platform that helps financial professionals drive growth, revenue, and retention.

It provides a wide range of pre-approved content, including much of what was previously available on the Forefield platform, along with exclusive Osaic content specifically tailored for financial professionals affiliated with Osaic.

### Q: How is AdvisorStream different from Forefield?

**A:** Broadridge sunset their Forefield marketing platform and replaced it with AdvisorStream, a more modern and robust digital marketing system offering a wealth of key new benefits, aimed at driving growth.

- ✓ **Content Recommendations Engine:** Informs advisors on their investors' real-time focus and provides content recommendations to further engage clients and prospects.
- ✓ **Automated Lead Capture:** Grow your business by sharing content across all channels and capture new leads.
- ✓ **Advisor Analytics:** Comprehensive analytics for advisors to better evaluate their marketing performance.
- ✓ **Content Sources All In One Place:** Access to thousands of pieces of investor-centric content, Broadridge thought leadership content and Osaic-exclusive content.
- ✓ **High-quality Content:** Share content exclusively licensed from more than 20 of the most trusted publishers including Wall Street Journal, Barron's, Financial Times, and more

### Q: How much will AdvisorStream cost and what does each package include?

**A:** For \$25/month (conveniently paid via commission deduction), the basic package includes:

- ✓ **Engaging content** featuring Osaic-exclusive content and Broadridge thought leadership content
- ✓ **Omni-channel posting** across social media, email, website, newsletters and more
- ✓ **Lead-optimized landing pages** to convert every click into a client
- ✓ **Powerful automation** ensures your digital presence is fresh, timely and relevant
- ✓ **AI-powered insights** identify the best communication to send based on client interests
- ✓ **Robust compliance tools** save time and help you stay compliant without sacrificing results



**For an additional \$75 per month, paid directly to Broadridge by credit card, the premium package includes:**

- All the benefits and features of the basic package plus
  - **Access** to fully licensed third-party content from more than 20 well-recognized consumer publications (e.g., *The Wall Street Journal*, *Barron's*, *Forbes*, *The New York Times*, and more)
  - **Weekly Done-For-You** newsletters automatically sent to clients

**Q: If I want the AdvisorStream upgrade, what do I do?**

**A:** Indicate your interest in the upgrade when you sign up on the [Advisor Stream sign up sheet](#). You'll need to provide Broadridge with your credit card number and the additional benefits will be unlocked. The additional \$75/month cost for the upgrade will be charged to your credit card. Once you have access to your account, you can upgrade your account to add the premium subscription feature(s). Instructions will be included in your welcome email.

**Q: I currently have MyCMO and want to switch to AdvisorStream. How would I do that?**

**A:** Before deciding about adding, keeping, or switching a platform, we suggest watching the recorded demos available for each marketing platform. To sign up for AdvisorStream:

- **Osaic:** click [this link](#) to sign up
- **Osaic Institutions:** email [oi.marketing@osaic.com](mailto:oi.marketing@osaic.com) for instructions

*Note: If you're a current MyCMO user and you want to switch to AdvisorStream, first check to see if Osaic is currently billing you for the MyCMO platform. If so, please remember to visit the subscription center in OneHub. If you have an upgraded package with FMG, please contact them directly to ask them to deactivate your MyCMO subscription. (Note: DO NOT cancel your account altogether in your OneHub account as this may affect your FMG website.)*

**Q: How do I get AdvisorStream training and support?**

**A:** For general support queries, please contact the AdvisorStream Support team Monday-Friday at [osaicservice@broadridge.com](mailto:osaicservice@broadridge.com) or through the Osaic dedicated phone line, (866) 893.8351.

To reset your password, please visit [Password Reset \(advisorstream.com\)](#). If you don't receive a new email to set credentials, please contact AdvisorStream support at [osaicservice@broadridge.com](mailto:osaicservice@broadridge.com) or (866) 893-8351.

Training videos are available on demand:



[Lesson 1 - Profile and Branding](#) (6 Minutes)

[Lesson 2 - Social Media and Automation](#) (10 Minutes)

[Lesson 3 - Contacts, Email and Newsletter](#) (10 Minutes)

The [\*\*Knowledge Center\*\*](#) is a great self-service option, providing access to over 300 help articles, videos, and webinars.

For questions about **marketing strategies leveraging AdvisorStream**, schedule a complimentary [\*\*First Friday Coaching Session\*\*](#) with the Advisor Marketing Solutions team.