



NEWS RELEASE

# Digital Experience Drives Advisor Engagement, SS&C Report Finds

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Latest Research Names Fidelity Top Digital Engagement Leader

WINDSOR, Conn., Jan. 21, 2020 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today released its annual research on the digital behaviors and expectations of financial advisors. The report identifies critical areas where asset managers can improve advisors' digital experience and provides industry examples of best practices. The study also found that better digital experiences significantly influence advisors' asset manager choice.



The **4 Ways to Set Up Your Digital Experiences for Success with the Next Generation** report analyzed responses from 582 financial advisors it surveyed about their online behaviors, expectations and needs, in association with **Horseshmouth**, an online community that helps financial professionals educate their clients and grow their businesses. Additionally, SS&C reviewed and ranked 54 asset managers on the experiences they deliver across the advisor website, LinkedIn, Twitter and email, both on desktop and smartphones.

Digital Engagement Leaders 2019	
Leading Firm	Rank
Fidelity Investments	1
Franklin Templeton Investments	2
Putnam Investments	3
PIMCO	4
Hartford Funds	5

"A growing number of today's advisors are digital natives, and they are raising the bar for online digital experiences," said Lee Kowarski, V.P., Head of Data Science & Distribution Solutions. "Asset managers have an opportunity to get ahead of the competition by improving digital engagement. By examining practices of digital leaders, we hope to help asset managers identify key areas for improvement and secure the resources for better digital programs."

"The next generation of advisors expect engaging, intuitive and personalized online experiences across both their professional and personal lives. Coupled with Fidelity's range of asset management products and solutions, we're committed to building online resources that incorporate – and anticipate – the needs of today's digital consumers," said Jon Davies, senior vice president, digital marketing, Fidelity Investments.

Key findings include:

- While 2 in 5 Millennial advisors say recommending relevant content based on their needs and interests would tip the balance in favor of a firm, only 11.1% of firms use personalization to deliver more relevant content at

the top of the website home page.

- Virtually all next-generation advisors are reading emails on their smartphones daily, but emails from just 5.4% of firms didn't require resizing to read on an iPhone.
- 3 in 10 firms demonstrate transparency by listing loads and breaking out fees on product profiles.

The report is available at **this link**.

## About SS&C Technologies

SS&C is a global provider of services and software for the financial services and healthcare industries. Founded in 1986, SS&C is headquartered in Windsor, Connecticut, and has offices around the world. Some 18,000 financial services and healthcare organizations, from the world's largest companies to small and mid-market firms, rely on SS&C for expertise, scale and technology.

SOURCE: SS&C

Additional information about SS&C (Nasdaq: SSNC) is available at [www.ssctech.com](http://www.ssctech.com).

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