



## ***O'Rourke and O'Brien Participant in Launch of Retirement Mastery Consultant Certificate Program***

Matrix Financial Solutions launched Matrix U, a component of the Retire Mastery Consultant Certificate (RMCC) program at its August 2009 "Get Connect" conference in Keystone, Colorado. IRI was proud to partner with Matrix Financial Services in the design and development of the RMCC program and Matrix U for financial advisers using an open architecture business model.

Pam O'Rourke and Mike O'Brien presented Matrix U attendees with a legislative and regulatory overview that highlighted new and pending initiatives that will impact the retirement industry. The session also illustrated how financial advisers and third party administrators can use regulatory change and industry trends to add value to existing client relationships and to build relationships with prospective clients.

Pam also moderated a panel of recordkeepers and third party administrators (TPAs) who guided advisers through the process of selecting and building a relationship with recordkeepers. This course provided practical tools and techniques for using the recordkeeper/TPA relationship to better serve existing retirement plan clients and attract new retirement plan business.

Matrix Financial Solutions, Inc., through its wholly owned subsidiaries, is one of the nation's largest providers of back-office, trust, custody, trading and mutual fund settlement services for financial institutions, including banks, trust companies, registered investment advisors and recordkeepers/third-party administrators (TPAs).