

**FOR IMMEDIATE RELEASE****Matrix Financial Solutions Launches Matrix U.**

*Open-Architecture Program offers Critical Training to Advisors  
in Rapidly Changing Environment*

**Denver, CO, May 28, 2009** — Matrix Financial Solutions, Inc. (“Matrix”), a leading provider of open-architecture products and services for third party administrators (TPA’s), financial advisors, banks and wealth management professionals, today announced the launch of its Matrix U program. Matrix U is a new educational program that provides the tools and resources advisors need to compete and grow their retirement plans business in an open-architecture environment. Matrix has retained the consulting and retirement services firm Integrated Retirement Initiatives (IRI) to oversee and assist with governance of the program.

Drawing on the unique experiences of industry thought leaders in areas such as open-architecture, regulatory compliance, operations, and effective sales techniques, Matrix U offers workshops, seminars, webinars, and personal coaching sessions, as well as an in-depth, certificate program. To introduce the program, Matrix U will hit the road with more than 30 Summit meetings in 16 cities across the country.

“This is a program that is not only important to Matrix, but also, I feel, important to the industry as we appear to be headed towards a full fee-disclosure era,” said John Moody, President, MSCS, a Matrix affiliate company. “With that, we partnered with IRI to ensure the program’s integrity. Their more than 20 years of expertise in areas such as ERISA and professional development will go a long way in making Matrix U a success.”

“Matrix U is an exciting program that we are pleased to be involved with,” said Mike O’Brien, Vice President, Product Development, IRI. “It is very timely and addresses today’s issues facing advisors. And, with the unique open-architecture approach, it will ensure that advisors are educated and prepared to meet the new regulations and provide their clients with the best possible products and services.”

“It’s important in today’s environment that advisors have the training and business partners in place to not only protect themselves but also their clients,” said Cindy Dash, Vice President and General Counsel, Matrix. “Having an independent resource that can keep the registered investment advisor current on the latest guidelines and provide them with unbiased,

objective co-fiduciary services is something that plan sponsors want and now demand. Matrix U can fill that void.”

Matrix U offers advisors many educational opportunities, including:

- *Open-Architecture Summit: A Roadmap to Success:* The Summit is a three-hour workshop designed for advisors, plan specialists and consultants that want to learn about open-architecture and how it can help them grow their business. (There are sixteen Summit meetings scheduled around the country. (Click [here](#) to view cities and dates).
- *Retire Mastery Certificate Program:* The Retire Mastery Certificate program is an in-depth educational experience involving on-line training programs, hands on training with investment selection and monitoring tools, such as the MG Advisory product, RetireTool(k)it, and a nine module institute that will help attendees master the key components of selling and servicing retirement plans using open-architecture. The institute will give advisers access to some of the top industry insiders and open-architecture practitioners in the financial services industry. (The first Retire Mastery Certificate program will be held August 16-18 in Keystone, CO).
- *Webinars:* Matrix U webinars are a quick way to learn more about the basics of open-architecture. These thirty-minute webinars will outline the benefits of open-architecture approach versus the bundled approach. (These introductory webinars are held every Wednesday at 2:30 MT, beginning in June).
- *Ongoing Education:* Continuing the educational process with Matrix U is easy and important. Web-based training programs and timely industry articles will keep advisors up-to-date on the latest news in the financial services industry, including open-architecture and regulatory developments, among others. A dedicated Matrix U web site will be launched later this year that will allow advisors convenient access to articles and recorded webinars that will qualify for Retire Mastery Certificate continuing education. (The website address is <http://matrixuniversity.fugent.com/home/events.asp>).

“In the past, bundled products have been attractive to advisers because they are easy-to-use, however, they also dramatically reduce the options available to participants,” said Cliff D’Amato, CEO, MSCS. “Matrix U levels the playing field and provides advisers with the option to learn about and move to an open-architecture approach. In the end, the ability to select funds objectively, purely on the basis of merit from a much larger universe is a decisive competitive advantage and is a win-win for the advisor and client.”

### **About Matrix Financial Solutions**

Matrix Financial Solutions is one of the nation’s largest providers of open-architecture products and services for third party administrators (TPA’s), financial advisors, banks and wealth management professionals. Formerly known as MG Colorado Holdings, Inc., Matrix Financial Solutions, through its wholly owned subsidiaries serves more than 300 financial institutions and over \$75 billion in assets on its trading and trust platform. Based in Denver, Colorado, Matrix Financial Solutions consolidates trust, trading,

communications and technology into one organization with a single focus: to deliver the most streamlined, user-friendly and cost-effective financial services to its customers. For more information, visit us online at [www.matrixfinancialsolutions.com](http://www.matrixfinancialsolutions.com).

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