

FOR IMMEDIATE RELEASE**Matrix U Winter Workshop Concludes; Two-Day Workshop Included
14 Educational Sessions Featuring Industry Thought-Leaders**

*Advisors From Around the Country Attend
Matrix U Winter Workshop on Open-Architecture*

Denver, CO, March, 23, 2010 — Matrix U, a leader in open-architecture education and services for retirement plan professionals, recently concluded another educational workshop. Held in Hollywood, Florida, the two-day event was packed with expert presenters, educational panels, and roundtable discussions that gave more than 150 attendees critical insight into the rapidly changing 401(k) space, and how those changes affect their business.

Matrix U, an educational concept developed by Clint Stanley, Vice President, MG Advisory Services, a Matrix Financial Solutions affiliate company, offered an impressive curriculum lead by industry insiders and thought leaders in areas such as open-architecture, regulatory compliance, fiduciary responsibility, operations, and effective sales techniques. These courses provided attendees with the tools and resources they need to compete and grow their retirement plan business in an open-architecture environment.

"Matrix U is one of the most informative workshops I have attended and I highly recommend it to all retirement advisors working in an open-architecture environment," said Robert Rowe, Senior Vice President, Investment, Raymond James & Associates, Inc. "Matrix U does an excellent job of bringing industry speakers together, outlining all the moving parts of open-architecture and how they work together, making the process easier than ever before. Implementing what I learned at Matrix U will save me time as I move forward and enable me to concentrate on growing my business."

"Bundled products are attractive because they are easy-to-use", said Dean Rodewald, Vice President, MG Advisory Services, "however, they also dramatically reduce the options available to participants. Matrix U teaches advisors how to navigate the open-architecture process and make it even easier than bundled products. From fund selection, to reporting, to enrollment meetings, Matrix U provides the roadmap to success in the open-architecture environment."

"This is our second two-day workshop, and to see advisors from all over the country, including two from Alaska attend, reinforces the value Matrix U provides and the interest there is in open-architecture," said Clint Stanley. "Advisors are beginning to recognize that it's important that they show

ownership of the plan through individual branding, such as enrollment kits, and quarterly and annual reporting. In the end, this will enable advisors to own the plan, all the while offering better options for their participants.”

In addition to the Matrix U workshops, 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.
- *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, www.MatrixUonline.com allows advisors convenient access to articles, a resource center and recorded webinars that will help qualify them for the Retire Mastery Consultant Certificate.
- *Webinars:* Matrix U webinars are a quick way to learn more about the basics of open-architecture. These sixty-minute webinars will outline the benefits of open-architecture approach versus the bundled approach. See www.MatrixUonline.com for scheduled events.

About Matrix Financial Solutions

Matrix Financial Solutions is a leading provider of retirement 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 \$98 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.

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