

**FOR IMMEDIATE RELEASE****Matrix Financial Solutions RetireTool(k)it™  
Has Breakout 2008**

*Launched in August, RetireTool(k)it already has 1,000 plans; First Quarter 2009  
Looks to Continue Momentum*

**Denver, CO, January 6, 2009** – MG Advisory Services, a Matrix Financial Solutions affiliate company and leading provider of 401(k) products and services that bridge the gap between product and platform, today announced that its flagship product RetireTool(k)it has exceeded its 2008 forecast. Launched in August 2008, MG Advisory Services has seen great demand for its product and currently has more than 15 of the leading TPA firms signed on, representing over 1,000 plans. In addition, MG Advisory Services also announced today that RetireTool(k)it is expected to exceed first quarter 2009 projections with more than 40 executable contracts outstanding, representing significant blocks of business.

Most recently, MG Advisory services agreed to terms with General Pension Planning Corporation (“General Pension”) to utilize its RetireTool(k)it for fund research, monitoring and reporting to meet the changing needs of General Pension’s clients. General Pensions will initially use RetireTool(k)it on some of its larger plans with a vision to continue to roll out to other plans throughout 2009.

“Working in an open-architecture environment is important to our business, but can be a daunting task for advisers. RetireTool(k)it will be a great asset to our organization and enable us to improve efficiencies enterprise wide,” said Steve Scudder, President of General Pension. “By having the research, monitoring and reporting of more than 18,000 mutual funds we now have a competitive advantage that will help us continue to grow our business without increasing costs.”

RetireTool(k)it sits in front of a robust investment research engine, powered by another Matrix affiliate, Prima Capital, a leading provider of research, due diligence, and technology solutions for wealth management to financial services companies, providing the adviser with a tool that delivers an end-to-end solution. The process begins with the adviser entering fund search mandates. RetireTool(k)it then produces investment products that meet those mandates, from the entire universe of available funds offered, and delivers a dynamically built Investment Policy Statement (IPS) based on the input. The RetireTool(k)it generates automated quarterly fund and annual plan review reports for the advisor to deliver to their plan sponsor clients.

Highlights of RetireTool(k)it include:

- Rational Open Architecture
- Fund Selection
- Investment Policy Statement
- Point-of-Sale Material
- Optional Co-Fiduciary Services
- Annual Plan Review

- Branded Enrollment Kits
- Core Fund List

“Bundled products are attractive to advisers because they are easy-to-use, but they also dramatically reduce the options available to participants,” said Stewart Cohune, President, MG Advisory Services. “RetireTool(k)it levels the playing field, providing advisers with easy-to-use, seamless access to a much more robust universe of funds. The ability to select funds objectively, purely on the basis of merit from a much larger universe is a decisive competitive advantage.”

To request an online demonstration of RetireTool(k)it’s features and benefits, please contact Don Vigil, Vice President, MG Advisory at 720-956-5474.

### **About Matrix Financial Solutions**

Matrix Financial Solutions is one of the nation’s largest providers of products and services for third party administrators (TPA’s), financial advisers, 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).

### **About MG Advisory Services**

MG Advisory Services is a leading provider of products and services that bridge the gap between product and platform. Its flagship product, RetireTool(k)it™ is a first-to-market web application that provides advisers, brokers and TPAs with a tool that delivers an end-to-end solution from fund selection and monitoring to point-of-sale brochure and plan enrollment kits. In addition, MG Advisory Services offers a risk based portfolio management solution for both qualified plans and wealth management. MG Advisory Services is a wholly owned subsidiary of Matrix Settlement & Clearance Services, LLC (“MSCS”). For more information, visit us online at [www.matrixfinancialsolutions.com](http://www.matrixfinancialsolutions.com).

### **About Prima Capital**

Prima Capital, a Matrix Financial Solutions affiliate company, is a leading provider of wealth management solutions to banks, broker-dealers, investment advisers and trust companies. Prima conducts objective, institutional-quality research and due diligence on separately-managed accounts, mutual funds, ETFs and alternative investments. This information is delivered to investment professionals’ desktops via Prima’s powerful and enabling web-technology, PrimaGuide™. Prima also offers asset allocation services, portfolio construction strategies and advice to executives who oversee wealth management programs. For more information, visit us online at [www.primacapital.com](http://www.primacapital.com).

### **About General Pension Planning Corporation**

General Pension Planning Corp., a premier provider of open-architecture daily valuation services, has provided guidance to retirement plan sponsors in the design, administration and communication of retirement plans since 1968. Its extensive experience and manageable size allow it to deliver high quality, enormously flexible, quick, cost-effective services, while keeping pace with new technology, legislation and market changes in order to serve its clients. General Pension Planning Corp offers a flexible menu of services designed tailored to the unique needs of each of its clients.

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