



Matrix Financial Solutions Gears Up for 13th Annual Get Connected Conference - August 18-21, 2013 -

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LAKE SUCCESS, N.Y., June 11, 2013 /PRNewswire/ -- Matrix Financial Solutions, a [Broadridge Financial Solutions, Inc.](#) (NYSE:BR) company, today announced the keynote speaker lineup for its upcoming [13th Annual Get Connected Conference](#) on August 18-21, at the Keystone Resort in Keystone, Colorado. The Get Connected Conference is attended by representatives from top banks, trust companies, third party administrators, investment advisers, broker-dealers, mutual fund companies, industry publications, and technology providers.

(Logo: <http://photos.prnewswire.com/prnh/20120319/NY720333LOGO>)

"Now in its 13th year, our Get Connected Conference is the premiere place for financial professionals to expand their knowledge, connect with leading industry professionals and gain new insight into the financial services industry," said John Moody, President, Matrix Financial Solutions. "Our keynote speaker list includes renowned individuals who have achieved notable success in their own endeavors, and we look forward to hearing their perspectives on how to successfully manage and grow a business, especially with a changing regulatory environment on the horizon."

The speakers – **Dr. Jill Bolte Taylor**, trained and published neuroanatomist; **Billy Beane**, Oakland A's General Manager and subject of *Moneyball*; **Stuart Varney**, Fox Business Anchor and Host of *Varney & Company*; **Rich Myers**, representing Edelman's renowned "Trust Barometer"; **Schlomo Benartzi**, leading authority on behavioral finance; and **Molly Fletcher**, Sports Agent and Founder of The Betterment Institute – will offer insights into how financial professionals can better manage and grow their businesses.

Conference Tracks

In addition to the above keynote speakers, Get Connected 2013 will also include breakout sessions in two main tracks – [Get Connected](#) and [Matrix U](#). The *Get Connected* track will feature sessions for third party administrators, advisors and bank professionals – intended for attendees looking to learn more about operations, business flow processes and other vital information to more effectively grow and manage their businesses. The *Matrix U* track will feature nine intensive review sessions designed to help advisors and other qualified plan professionals pass ASPPA's Plan Financial Consultant (PFC-1) exam. The track will be led by Sarah Simoneaux of SCS Consulting, and author of Retirement Plan Consulting for Financial Professionals, a book that is used in ASPPA's PFC-1 Qualified Plan Financial Consultant (QPFC) course. ASPPA, NIPA, CFP, CRPS and CLU CPE credits will be offered for every session. The *Matrix U* track has been developed as part of a strategic partnership announced earlier this year between Matrix, the National Association of Plan Advisors (NAPA), the American Society of Pension Professionals and Actuaries (ASPPA), and SCS. Beginning with the 2014 conference, the *Matrix U* track will feature the PFC-2 advisor certificate program. Participating advisors will be eligible to take exams onsite, making Get Connected the only conference offering this opportunity.

The *Matrix U* track also features an advanced course geared towards more experienced advisors. *Matrix U* advanced is an intense training program with an interactive approach that offers attendees the chance to ask questions and participate in the sessions in a town hall and roundtable setting. A third party administrator/advisor roundtable will take place with various topics highlighted throughout the program, including information on plan wellness check-ups, in-plan Roth conversions and Roth IRAs, and an update on fiduciary standards. CE credits will be available for most sessions.

Keynote Speaker Bios

Dr. Jill Bolte Taylor currently serves as President of the Greater Bloomington Affiliate of NAMI (National Alliance on Mental Illness) in Bloomington, Indiana. Her specialty was in the post-mortem investigation of the human brain as it relates to schizophrenia and severe mental illnesses. Dr. Taylor travels as the National Spokesperson for the Mentally Ill for the Harvard Brain Tissue Resource Center (Harvard Brain Bank).

Billy Beane, the Oakland A's General Manager and subject of *Moneyball*, is considered one of the most progressive and talented baseball executives in the game today. Billy has molded the Oakland Athletics into a perennial post-season contender since assuming the general manager's duties shortly following the 1997 season. Under his watch, the A's have compiled the fourth-best record in the American League and seventh best in all of baseball.

Stuart Varney is credited with changing the way financial and economic news is reported worldwide, consistently winning excellent reviews from audiences. Stuart anchors *Varney & Company* on the FOX Business Network, appearing regularly with Sean Hannity, Bill O'Reilly, and Megyn Kelly, among others. Varney's experience and in-depth knowledge enables him to address key economic issues facing the retirement industry.

Rich Myers has over 25 years of experience working with leaders in the financial sector, government and politics to develop and manage effective stakeholder communication programs. In the trading community, he has served in leadership roles at Nasdaq, the Chicago Board of Trade, and Liquidnet, an award-winning global broker. As head of Edelman's New York financial group, he has advised some of the world's leading alternative asset managers, including Silver Lake, Jefferies, Citadel, Perry Capital, Nomura, Credit Suisse and CME Group. Edelman releases an annual [Trust Barometer](#) that measures the state of trust around the world by exploring trust in institutions, industries, leaders, and the impact of the recent crises in the banking and financial service sectors. Rich will discuss those key findings and address the importance of trust to Financial Services professionals.

Schlomo Benartzi, PhD, is a leading authority on behavioral finance with a special interest in personal finance and participant behavior in defined contribution plans. He received his Ph.D. from Cornell University's Johnson Graduate School of Management and is currently co-chair of the Behavioral Decision-Making Group at The Anderson School at UCLA. Professor Benartzi is also co-founder of the Behavioral Finance Forum, a collective of 40 prominent academics and 40 major financial institutions from around the globe.

Nicknamed "the female Jerry Maguire" by CNN, **Molly Fletcher** has worked with hundreds of top athletes, coaches and media personalities in her career as a sports agent. An entrepreneur, author and keynote speaker, Molly heads up her own business, MWF Enterprises, LLC. Molly has worked with some of the top names in the sports industry, including Tom Izzo, Ernie Johnson, Jr., Matt Kuchar, Doc Rivers, John Smoltz, Joe Theismann, among other notable personalities.

About Matrix Financial Solutions

Matrix Financial Solutions, now part of Broadridge Financial Solutions, Inc., is a leading provider of *TrueOpen*™ retirement products and services for third party administrators, financial advisors, banks and other financial professionals. Matrix serves more than 300 financial institutions with over \$200 billion in customer assets processed through its trading platform. For more information about Matrix please visit matrix.broadridge.com.

About Broadridge

Broadridge Financial Solutions, Inc. (NYSE:BR) is the leading provider of investor communications and technology-driven solutions for broker-dealers, banks, mutual funds and corporate issuers globally. Broadridge's investor communications, securities processing and operations outsourcing solutions help clients reduce their capital investments in operations infrastructure, allowing them to increase their focus on core business activities. With 50 years of experience, Broadridge's infrastructure underpins proxy voting services for over 90% of public companies and mutual funds in North America, and processes more than \$4.5 trillion in fixed income and equity trades per day. Broadridge employs approximately 6,200 full-time associates in 13 countries. For more information about Broadridge, please visit broadridge.com.

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