



Broadridge's Matrix Financial Solutions Enhances RetireTool(k)it® Offering

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LAKE SUCCESS, N.Y., July 24, 2012 /PRNewswire/ -- Matrix Financial Solutions, a Broadridge Financial Solutions (NYSE: BR) company and leading provider of TrueOpen Architecture retirement plan products and services for broker/dealers, financial advisors and third party administrators, today announced the launch of a more robust version of its Matrix RetireTool(k)it.

(Logo: <http://photos.prnewswire.com/prnh/20120319/NY72033LOGO>)

Designed as an end-to-end retirement plan solution for advisors, the enhanced version of RetireTool(k)it features a more user-friendly fund selection and monitoring process, an updated plan proposal generator, support for new U.S. Department of Labor regulations, data from Morningstar, Inc., and an updated database of more than 25,000 fund options.

"The new version of RetireTool(k)it is another example of us listening to our clients and understanding the changing financial services landscape," said John Moody, President, Matrix Financial Solutions. "With new regulations impacting the retirement plan market, in particular, organizations are scrambling to stay current, be in compliance and win new business. RetireTool(k)it's enhanced user interface and improved logic supports all these initiatives and enables clients to streamline the process – all in our industry-leading TrueOpen Architecture environment that provides a clear competitive advantage."

In addition to the new enhancements, RetireTool(k)it also features customized proposals, access to quarterly and annual reports, as well as investment policy statements.

RetireTool(k)it is part of the Matrix Broker/Dealer Platform, an integrated suite of retirement planning products and services designed specifically to help broker/dealer firms and RIAs more successfully navigate the retirement plan process by improving efficiencies, and providing assistance in supporting regulatory mandates. The Broker/Dealer Platform includes plan data feed and level compensation services, as well as the RetireTool(k)it advisor desktop applications.

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 \$145 billion in customer assets processed through its trading platform. For more information about Matrix please visit www.matrixfinancialsolutions.com.

About Broadridge Financial Solutions

Broadridge is a technology services company focused on global capital markets. Broadridge is the market leader enabling secure and accurate processing of information for communications and securities transactions among issuers, investors and financial intermediaries. Broadridge builds the infrastructure that underpins proxy services for over 90% of public companies and mutual funds in North America; processes more than \$4 trillion in fixed income and equity trades per day; and saves companies billions annually through its technology solutions. For more information about Broadridge please visit www.broadridge.com.

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