



Matrix Financial Solutions Re-launches Matrix U; Targeted on Helping Financial Services Providers Accelerate the Growth of Their Retirement Plan Business

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LAKE SUCCESS, N.Y., March 12, 2013 /PRNewswire/ -- Matrix Financial Solutions, a [Broadridge Financial Solutions, Inc.](#) (NYSE:BR) company, has re-launched its popular Matrix U program as an educational resource bringing industry experts and thought leaders together for the benefit of financial advisors, third-party administrators (TPAs), broker-dealer firms and mutual fund wholesalers. As part of the re-launch, Matrix U will feature live and on-demand webinars, on-site workshops and educational materials, all focusing on helping financial services professionals to stay abreast of the latest trends and how to leverage current market conditions to grow their businesses.

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

"Matrix U is all about sales enablement and execution," said John Moody, President, Matrix Financial Solutions. "Whether it's a discussion on the latest industry regulations, trends or workflow processes, Matrix U is all about helping organizations align all of its resources so that the right information and tools are in place and can be delivered in a way that is relevant to each unique selling situation."

"As we continue to penetrate the broker-dealer space and work with more RIAs, we see the need for a resource like Matrix U; a program that can help them navigate the complex sales process and ensure that the latest information on regulations and trends, among others, is available. Matrix U is uniquely positioned to be the go-to resource for the financial services community," added Mr. Moody.

In addition to providing the tools and resources financial services professionals need to compete and grow their businesses in this ever changing environment, Matrix U will also offer certified courses that qualify for various CE credits, including ASPPA, NIPA, CFP, CRPS and CRPC.

Matrix U's first webinar will be March 20th and will feature Sarah Simoneaux, former ASPPA president. This first webinar is entitled [Plan Design 1: Defined Contribution and Defined Benefit Plans](#).

Future webinar topics include:

- Fiduciary Roles and Responsibilities
- Increasing Distribution: Changing Advisor Behavior
- What Advisors Should Know about Plan Design
- The UnBundled Bundled Solution: Partnering with TPAs and Recordkeepers

For more information on Matrix U webinars, and products and services that can help financial services professionals grow their businesses, you can visit [retiretoolkit.com](#).

About Matrix Financial Solutions

Matrix Financial Solutions, now part of Broadridge Financial Solutions, Inc., is a leading provider of *TrueOpen*TM retirement products and services for third party administrators, financial advisors, banks and other financial professionals. Matrix serves more than 300 financial institutions with over \$185 billion in customer assets processed through its trading platform. For more information about Matrix please visit www.matrixfinancialsolutions.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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