



Matrix Financial Solutions Teams up with ASPPA, NAPA and SCS to Deliver Financial Advisor Education

Released : 05 09 2013

LAKE SUCCESS, N.Y., May 9, 2013 /PRNewswire/ -- Matrix Financial Solutions, a [Broadridge Financial Solutions, Inc.](#) (NYSE: BR) company, the National Association of Plan Advisors (NAPA), the American Society of Pension Professionals and Actuaries (ASPPA), and SCS Consulting, Inc. (SCS) announced today a strategic partnership dedicated to industry education for retirement plan financial advisors. The group is expanding upon previous joint training initiatives to now offer regular webinars, in-person training sessions, and original content distribution to help financial advisors maintain and grow their retirement plan practice.

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

Included in the newly expanded initiative, the program will feature more than 10 webinars beginning on May 21st with [The Basics of 403\(b\) Plans: Is it really a one trillion dollar market?](#). Each educational webinar will include industry thought leaders, Washington insiders and/or certified instructors. The majority of webinars will qualify for *ASPPA*, *NIPA*, *CFP*, *CRPS* and *CRPC* continuing education credits. In addition, CPE certificates can be provided for those seeking other CPE credit.

In August, Matrix Financial Solutions will hold its annual *Matrix U* conference in Keystone, CO, that will offer live sessions for financial advisors, as well as access to boot camp training that will follow the curriculum of ASPPA's Plan Financial Consultant (PFC-1) advisor certificate program, delivered by industry expert Sarah Simoneaux of SCS. Beginning in 2014, the *Matrix U* conference will feature the PFC-2 advisor certificate program. Participating advisors will be eligible to take exams onsite during the *Matrix U* program, the only conference offering this opportunity.

"The core mission of NAPA is threefold: education, advocacy, and business intelligence," said Lisa Allen, Institutional Education Programs Advocate. "Matrix is dedicated to the retirement plan industry and the advisors who service it, and is a long-standing and valued partner in our efforts."

Sarah Simoneaux added, "The key differentiator created with the training provided by this expert team is that we are delivering not just industry information, but the tools to put that knowledge into practice. Additionally, we also focused on convenience. With multiple webinars, plus live sessions at *Matrix U*, it's easily accessible to all advisors in one format or another."

"When we [relaunched our Matrix U program](#) in March, it was with this type of initiative in mind – continually creating new value-added services for our third-party administrator, financial advisor, and broker-dealer partners," said John Moody, President, Matrix Financial Solutions. "Partnering with best-in-class education providers adds great value and credibility to our *Matrix U* program. We are now able to offer multiple programs, allowing our partners to choose which option is best for them. And most importantly, provide them with the tools and knowledge they need to build successful retirement plan practices."

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 \$193 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.

About ASPPA/NAPA

[The American Society of Pension Professionals & Actuaries \(ASPPA\)](#) is a national organization of more than 11,000 retirement plan and benefits professionals that serves as the educator, voice, and advocate for the employer-based retirement system. ASPPA members are administrators, actuaries, advisors, attorneys, accountants, and other financial services professionals who provide consulting and administrative services for qualified retirement plans.

The National Association of Plan Advisors (NAPA) is an affiliate organization of the American Society of Pension Professionals & Actuaries (ASPPA). NAPA was created by and for retirement plan advisors with a specific purpose—to provide plan advisors with greatly needed advocacy, business intelligence and superior networking opportunities. Membership is open to all retirement plan advisors and support personnel. NAPA's mission is to be a leader in the evolution of the national retirement system to improve transparency, effectiveness, and governance in an effort to improve the retirement outcome and security for participants. For more information, visit napa-advisors.org.

About SCS

Simoneaux & Stroud Consulting Services (SCS) offers consulting and education services to the retirement services industry. The firm specializes in strategic planning, business consulting, facilitated brainstorming, industry research, professional development, employee training, and professional skill building workshops and webcasts. SCS' nationwide customer base includes Third Party Administrators, Recordkeepers, Financial Institutions, Financial Advisors, Broker Dealers, and Industry Organizations working in the retirement services industry. In addition to their roles as consultants and educators, they also serve as industry experts, speakers, authors, facilitators, coaches, and mentors.

For Matrix:	
Linda Namias	Maggie Nolan
Broadridge	Brainerd Communicators, Inc.
(631) 254-7711	(212) 986-6667
linda.namias@broadridge.com	nolan@braincomm.com
For ASPPA/NAPA:	
Melinda Semadeni	
American Society of Pension Professionals & Actuaries	
(703) 516-9300 ext. 130	
msemadeni@asppa.org	
For SCS:	
Sarah Simoneaux	
Simoneaux & Stroud Consulting Services	
(985) 210-2406	
sarah.simoneaux@scs-consultants.com	

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