

# Matrix Financial Solutions Advances Advisor Educational Series to Meet the Needs of Today's Retirement Plan Professionals

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LAKE SUCCESS, N.Y., Jan. 7, 2014 /PRNewswire/ -- Matrix Financial Solutions, a [Broadridge Financial Solutions, Inc.](#) (NYSE:BR) company, today announced the next in its series of advisor educational webinar and in-person training sessions that will bring industry experts and thought leaders together to provide guidance to retirement plan professionals. Part of a continuing program to help financial advisors maintain and grow their retirement plan practices, this newest series of educational sessions will help advisors earn their Qualified Plan Financial Consultant (QPFC) designation and learn how to navigate possible new regulatory changes.

The live, in-person training sessions and webinars (which will also be available on-demand) will follow a curriculum created in conjunction with the American Society of Pension Professionals & Actuaries (ASPPA), an industry leading retirement plan professional association. The program will offer advisors the opportunity to earn their PFC-1 certification, as well as participate in sessions geared towards building a better overall practice.

As an epilogue to the PFC-1 certification, which concludes in June, 2014, Matrix will host a PFC-2 bootcamp at its annual Get Connected Conference in Keystone, CO, in August, 2014. The offering is the only industry conference approved to offer the PFC-2 exam on-site. After completion of both the PFC-1 and PFC-2 exams, advisors will receive the industry recognized QPFC certification.

"Today's financial advisors need the proper skill set to plan for and deal with the changing regulatory environment, and at the same time grow their businesses," said Cindy Dash, COO, Matrix Financial Solutions. "As a leader in the industry, Matrix is committed to being a partner to TPAs and advisors. Working with ASPPA gives us the ability to offer an extended selection of valuable educational programs so advisors are better equipped to be a stronger asset to their plan sponsors and ultimately win new business by capitalizing on opportunities within the industry."

"At ASPPA, we value preparing retirement professionals with a framework that supports their success," said Lisa Allen, Institutional Education Programs Advocate, ASPPA. "Matrix has taken the initiative to do just that by offering their services and expertise to educate financial professionals to help them accomplish their goals, and encourage growth in the retirement industry as a whole."

As a result of the current advisor selling season, Matrix's next webinar, *Overview of Qualified, Non-Qualified, and Non-ERISA Plans*, will take place on January 22, 2014 and will feature Sarah Simoneaux, former ASPPA president. The webinar schedule, to date, is as follows:

- January 22: Overview of Qualified, Non-Qualified, and Non-ERISA Plans
- February 19: Plan Design 1: Overview of DC and DB Plans
- March 19: Plan Design 2: 401(k) and Hybrid Plans
- April 2: 401(k) Nondiscrimination & Testing
- April 16: Distribution Planning
- May 21: Dealing with Changes: Plan Termination, M & A s and New Legislation
- June 18: PFC-1 Certification Exam

In addition to offering the webinars, Matrix will host a series of in-person bootcamps in cities throughout the U.S. Current cities on the schedule include Dallas, TX, Phoenix, AZ, Tempe, AZ, and San Diego, CA. All webinars and training sessions are free of charge. For more information and to register for any of the scheduled webinars, [click here](#).

To access replays of the Spring 2013 webinar series or for more information on Matrix products and services that can help financial services professionals grow their businesses, visit [matrix.broadridge.com](#).

## About Matrix Financial Solutions

Matrix Financial Solutions, now part of Broadridge Financial Solutions, Inc., is a leading provider of *TrueOpen*<sup>TM</sup> 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 business process outsourcing solutions help clients reduce their capital investments in operations infrastructure, allowing them to increase their focus on core business activities. With over 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 \$5 trillion in fixed income and equity trades per day. Broadridge employs approximately 6,400 full-time associates in 13 countries. For more information about Broadridge, please visit [www.broadridge.com](#).

## About ASPPA

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.

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