

Broadridge's Matrix Financial Solutions to Address Challenges and Opportunities Facing Financial Services Professionals at Get Connected 2014

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LAKE SUCCESS, N.Y., July 21, 2014 /PRNewswire/ -- Matrix Financial Solutions, Inc., a [Broadridge Financial Solutions, Inc.](#) (NYSE:BR) company, today announced the keynote speaker lineup and other highlights for its upcoming [14th Annual Get Connected Conference](#) August 17-20, at the Keystone Conference Center in Keystone, Colorado. The speakers will address the keys to success for financial services professionals through 'Building a Winning Team.'

Scheduled to appear at Get Connected 2014 are: **John Foley**, leader of CenterPoint and former Lead Solo of the Blue Angels Flight Demonstration Team; **Joe Montana**, NFL veteran; **Bob Woodward**, a journalist and acclaimed non-fiction author; **Mike Rayburn**, "The World's Funniest Guitar Virtuoso"; **LCDR Rorke T. Denver**, U.S. Navy SEAL trainer and actor, who will share how perseverance and building the right team can lead financial professionals to achieve success and maximize productivity to ultimately grow their businesses; and **Brian Graff**, CEO, ASPPA, who will provide a Washington Update that will focus on current proposed legislation.

"In today's highly competitive and ever-changing financial environment, financial services professionals face significant challenges, including client retention, transparency, operational efficiency, regulatory change and access to mission-critical, actionable data," said John Moody, President, Matrix Financial Solutions. "We feel that this year's speaker line up will provide insight into these challenges when they share their own personal experiences in how they overcame challenges to lead successful teams. At the end of the day, we want our attendees to be able to take what they learned at the conference back to the office to drive the productivity and success of their teams."

Conference Tracks

The keynote speakers will complement Get Connected's full range of sessions, which are organized in three main conference tracks – [Matrix U](#), [TPA/Advisor](#) and [Bank/Trust](#). The *Matrix U* track will provide the opportunity for those eligible to take the ASPPA PFC-2 exam on-site at the conference. Throughout the year, Matrix held a series of advisor educational webinars and in-person training sessions that brought industry experts and thought leaders together to provide guidance to retirement plan professionals in preparation for the exam, as well as the PFC-1 certification in June. Upon completion and passing the exam at the conference, advisors will be awarded their Qualified Plan Financial Consultant ("QPFC") designation. The track will also feature intensive review sessions designed specifically to help advisors and other qualified plan professionals pass the ASPPA PFC-2 exam that will be led by Sarah Simoneaux, the author of *Retirement Plan Consulting for Financial Professionals*, which is used for ASPPA's QPFC designation. An intense course will also be offered through this track that features an interactive model approach in a town hall and roundtable setting.

The *TPA/Advisor* track is for the traditional TPA/Advisor looking to learn more about today's financial service's issues and how to leverage these issues to grow their business. The *Bank/Trust* track will offer more than seven CE eligible sessions that were developed in conjunction with The Fiduciary Education Center and will touch upon the interests of Broadridge's diverse bank customers and provide insight into today's hot topics.

Attendees that register for either the *TPA/Advisor* track or *Bank/Trust* track are welcome to attend any session in either track. *Matrix U* attendees are required to attend only sessions in their respective track (Matrix U or Matrix U Advanced). ASPPA, NIPA, CFP, CRPS and CLU CPE credit will be offered for every session and CE credits will also be available for most sessions.

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.

About Matrix Financial Solutions

Matrix Financial Solutions, Inc., a Broadridge company, 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 \$230 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](#).

Media Contacts	
Linda Namias	Danielle Pieri
Broadridge	Brainerd Communicators, Inc.
(631) 254-7711	(212) 986-6667

linda.namias@broadridge.com	pieri@braincomm.com
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