

**FOR IMMEDIATE RELEASE****MG Advisory Expands RetireTool(k)it Services;  
Adds Plan Proposals to the Application**

*New Plan Proposal Outlines Open-Architecture Process to Sponsors;  
Helps Advisers Compete with Bundled Providers.*

**Denver, CO, November 17, 2009** – MG Advisory Services, LLC, a leading provider of products and services to financial advisors, broker/dealers and TPAs, today announced an expansion of its RetireTool(k)it product to include plan proposals. The proposal assists the advisor in explaining the benefits of open-architecture, roles and responsibilities of all the parties involved and ultimately, investment recommendations based on the plan sponsors investment policy statement.

“The plan proposal is an important part of our open-architecture process as it bridges the gap between open-architecture and bundled product offerings,” said Stewart Cohune, president, MG Advisory. “It clearly and easily enables advisers working in an open-architecture environment to set expectations and educate plan sponsors about the overall retirement plan process. This clearly eliminates a major barrier for open-architecture advisers and allows them to confidently sell open-architecture to their clients.”

Continues Cohune, “Advisors sell bundled products because they are easy, but it also dramatically reduces the options available to the participant. As we continue to rollout new features for the RetireTool(k)it, it levels the playing field with bundled providers. Now, just as easily, an adviser can offer a plan sponsor a universe of more than 18,000 funds to choose from without increasing the amount of time and resources need to set up and monitor the plan. That is a powerful competitive advantage.”

Highlights of the plan proposal product include:

- Professional and automated plan proposal that competes with bundled providers
- Reports that compare current fund list against proposed fund list
- Fund matrix and fund fact sheets
- Proprietary RetireTool(k)it™ fund scorecard
- Expectation outline to plan sponsor

RetireTool(k)it sits in front of a robust investment research engine, powered by another Matrix Financial Solutions affiliate, Prima Capital®, a leading provider of research, due diligence, and technology solutions for wealth management to financial services companies, providing the advisor with a tool that delivers an end-to-end solution. The process begins with the advisor entering fund search mandates. RetireTool(k)it then produces investment products that meet those mandates, from the entire universe of available funds offered, and delivers a dynamically built Investment Policy Statement (IPS) based on the input. The RetireTool(k)it generates automated quarterly fund and annual plan review reports for the advisor to deliver to their plan sponsor clients.

MG Advisory Services is a Matrix Financial Solutions affiliate company. Other affiliates under the Matrix Financial Solutions umbrella include Matrix Settlement and Clearance Services, MG Trust, Matrix Communications Technologies, MSCS Financial Services, Prima Capital and Optech Systems.

**About Matrix Financial Solutions**

Matrix Financial Solutions is one of the nation's largest providers of products and services for third party administrators (TPA's), financial advisors, banks and wealth management professionals. Formerly known as MG Colorado Holdings, Inc., Matrix Financial Solutions, through its wholly owned subsidiaries serves more than 300 financial institutions and over \$85 billion in assets on its trading and trust platform. Based in Denver, Colorado, Matrix Financial Solutions consolidates trust, trading, communications and technology into one organization with a single focus: to deliver the most streamlined, user-friendly and cost-effective financial services to its customers. For more information about Matrix Financial Solutions, visit us online at [www.matrixfinancialsolutions.com](http://www.matrixfinancialsolutions.com).

**About MG Advisory Services, LLC**

MG Advisory Services is a leading provider of products and services that bridge the gap between product and platform. Its flagship product, RetireTool(k)it™ is a first-to-market web application that provides advisors, brokers and TPAs with a tool that delivers an end-to-end solution from fund selection and monitoring to point-of-sale brochure and plan enrollment kits. In addition, MG Advisory Services offers a risk based portfolio management solution for both qualified plans and wealth management. MG Advisory Services is a wholly owned subsidiary of Matrix Settlement & Clearance Services, LLC ("MSCS"). For more information, visit us online at [www.matrixfinancialsolutions.com](http://www.matrixfinancialsolutions.com).

**About Prima Capital Holding, Inc.**

Prima Capital Holding, Inc. ("Prima Capital"), a Matrix Financial Solutions affiliated company, is a leading provider of wealth management solutions to banks, broker-dealers, investment advisors and trust companies. Prima Capital conducts objective, institutional-quality research and due diligence on separately-managed accounts, mutual funds, ETFs and alternatives. This information is delivered to investment professionals' desktops via Prima's powerful and enabling web-technology, PrimaGuide™. Prima Capital also offers asset allocation services, portfolio construction strategies and advice to executives who oversee wealth management programs. For more information, visit us online at [www.primacapital.com](http://www.primacapital.com).

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