

**For Immediate Release****Matrix Financial Solutions Acquires ICC Plan Solutions**

**Denver, CO, December 18, 2007** – Matrix Financial Solutions today announced that it has acquired ICC Plan Solutions, a leading provider of communication materials and systems for the Retirement Plan and Health Plan Markets. Effective immediately, ICC Plan Solutions will be known as Matrix Communications Technologies. The acquisition broadens the products and services Matrix Financial Solutions offers to the retirement plan industry, now being able to provide end-to-end solutions, in an open architecture environment for TPAs, advisors and other retirement plan professionals. Financial terms of the transaction were not disclosed.

"This acquisition is consistent with our strategy to invest in businesses that deliver quality products and services to our customers," said John Moody, President, Matrix Settlement and Clearance Services. "The new Matrix Communications Technologies fits together well with the other Matrix Financial Solutions' companies because our product offerings are complementary, and because we have similar customers and expertise in this industry."

Matrix Communications Technologies will specialize in providing communication materials and systems to the retirement plan industry. In addition, the firm will work as a consultant to the Advisor, Record Keeper or Administrator to help them solve the challenges of participant communications through the use of technology and electronic delivery.

"As a former TPA, I truly understand how important this deal is in enabling us to streamline our clients plan installation and conversion process by integrating two necessary functions into one," said Stewart Cohune, President, MG Advisory, a Matrix Financial Solutions subsidiary. "Being able to come to us for end-to-end solutions will save them an inordinate amount of time and money. We are interested in enabling our TPA clients to better compete with the bundled providers; this is a significant step in the right direction."

Products and services offered by Matrix Communications Technologies include:

- Enrollment Kits
- Participant Statements
- Health Plan and HSA Enrollment Kits
- GAP and Wealth Accumulation Analysis
- Reporting System Design
- Enrollment Videos
- Benefit Statements
- Collateral Materials

"This is a great milestone for our company and we look forward to scaling our growth as part of Matrix Financial Solutions," said Danny Streiff, President, Matrix Communications Technologies. "Matrix's brand awareness and goodwill in the

industry makes this an ideal situation for us. We look forward to being part of the Matrix team and working together towards a rapid and seamless transition."

Matrix Communications Technologies is a Matrix Financial Solutions affiliate company. Other affiliates under the Matrix Financial Solutions umbrella are Matrix Settlement and Clearance Services, MG Trust, MG Advisory, MSCS Financial Services, Prima Capital and Optech Systems. Matrix Financial Solutions' major investor is Bluff Point Associates, which is a private equity firm focused on financial services technology and processing.

"This transaction provides value to our customers across all the portfolio companies" said Bobby Jones, a partner in Bluff Point Associates. Jones further stated "electronic communications will be a growing and enabling factor in acquiring new accounts, improving efficiencies, and interacting with investors regarding performance for our clients in wealth management as well as the retirement arena. Matrix Communications Technologies will accelerate our growth opportunities but more importantly, our clients' growth opportunities, which is a key criteria as we look at further Bluff Point investments in 2008."

#### **About Matrix Financial Solutions**

Matrix Financial Solutions, Inc. is one of the nation's largest providers of back-office, trust, custody, trading and mutual fund settlement services for financial institutions, including banks, trust companies, registered investment advisors and record-keepers/third-party administrators (TPAs). Formerly known as MG Colorado Holdings, Inc., Matrix Financial Solutions through its wholly owned subsidiaries serves more than 260 financial institutions by servicing \$90 billion in assets on its trading and trust platform. Based in Denver, Colorado, Matrix Financial Solutions consolidates trust, trading 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, visit us online at [www.matrixfinancialsolutions.com](http://www.matrixfinancialsolutions.com).

#### **About Matrix Communications Technologies**

Matrix Communications Technologies is an industry leader in business communications and technology. It specializes in the design and production of materials and systems for the Retirement Plan market. Matrix Communications Technologies offers low cost, customizable enrollment kits, participant statements, participant newsletters, enrollment videos, mutual fund reporting systems and gap & wealth accumulation analysis.

#### **About Bluff Point Associates**

Bluff Point is a private equity firm based in Westport, Connecticut. The firm focuses on investments in information services companies supporting the banking, trust, securities and wealth management sectors of the financial services industry. Bluff Point is the major investor in Matrix Financial Solutions, which is the owner of Matrix Settlement & Clearance Services, MG Trust and a major investor in Prima Capital. Bluff Point and its affiliates also hold direct investments in InvestLink Technologies, Innovest Systems, Wealth Management Systems and HealthConnect Systems.

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