

Matrix Financial Solutions, Inc. Launches RetireTool(k)it™

*RetireTool(k)it Bridges Gap Between Product and Platform
to Offer Advisory's End-to-End Solution*

Denver, CO, October 15, 2008 – Matrix Financial Solutions, Inc. (“Matrix”) one of the nation’s largest providers of products and services for third party administrators (TPA’s), financial advisors, banks and wealth management professionals today announced the release of its new advisory desktop product, RetireTool(k)it™. RetireTool(k)it, which will be available through Matrix’s wholly owned subsidiary, MG Advisory Services, is a first-to-market web application that provides advisors, brokers, and TPAs with an open architecture tool that delivers an end-to-end solution, from fund selection and monitoring, to investment policy statement, point-of-sale brochure and plan enrollments kits. Advisors can use RetireTool(k)it to select and monitor funds themselves, or hire MG Advisory Services to fill a co-fiduciary role with the plan sponsor.

RetireTool(k)it sits in front of a robust investment research engine, powered by another Matrix affiliated company, 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. Additionally, when MG Advisory Services is hired as co-fiduciary and the RetireFocus funds (target maturity date funds) are included as the QDIA option, customized enrollment booklets to the plan are provided at no additional cost.

“One significant complaint about open architecture is the daunting task of fund selection and the ongoing fund monitoring of more than 18,000 funds,” said Cliff D’Amato, CEO, Matrix Settlement and Clearance Services, a Matrix affiliated company and parent to MG Advisory Services. “RetireTool(k)it handles all that for you and makes the process easy and seamless. It is a decisive advantage that funds are included based on the merits of each fund, not just because they are included in some vendor’s product.”

Once the funds have been selected for the plan, RetireTool(k)it provides automatic quarterly fund monitoring and annual plan review reports that are consistent with the criteria established in the IPS. Due in part to Matrix’s relationships with independent recordkeepers, RetireTool(k)it provides a first to market annual plan review that summarizes plan and participant level data as well as fund performance data in a bound report that competes favorably with what the advisor is accustomed to receiving from the bundled providers of 401(k) plans.

“The first thing to do is to make selling a 401(k) plan using open architecture as easy as it is with a bundled product. RetireTool(k)it is a significant step toward that objective,” said Stewart Cohune, President, MG Advisory Services. “RetireTool(k)it represents the best of both worlds. It is full disclosure, fee transparency, mutual

funds at NAV, with the automated and professional reporting consistent with bundled provider output. Not to mention it will save the advisor an inordinate amount of time and resources that he or she can now spend prospecting.”

Highlights of RetireTool(k)it include:

- Rational Open Architecture
- Fund Selection
- Investment Policy Statement
- Point-of-Sale Material
- Optional Co-Fiduciary Services
- Annual Plan Review
- Branded Enrollment Kits
- Core Fund List
- ERISA 3(21) Fiduciary Status with Plan Sponsor

“The launch of the RetireTool(k)it is another example of our commitment to providing products and services to the 401(k) industry that help advisors, TPAs, recordkeepers and bank employee benefit departments to be more efficient and grow their business,” said John Moody, President, Matrix Settlement and Clearance Services. “With the addition of Prima Capital and Matrix Communications Technologies to the Matrix family, we are now positioned to be a leading provider of 401(k), open architecture products and services – something the industry has been asking for, but until now has not been delivered.”

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 by servicing \$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, visit us online at www.matrixfinancialsolutions.com.

Securities products and services are offered through MSCS Financial Services, LLC, member FINRA/SIPC, and a subsidiary of Matrix Settlement & Clearance Services, LLC and Matrix Financial Solutions, Inc.

About MG Advisory Services

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.

About Prima Capital

Prima Capital, a Matrix Financial Solutions affiliate company, is a leading provider of wealth management solutions to banks, broker-dealers, investment advisors and trust companies. Prima 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 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.

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 and wealth accumulation analysis.

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