Prima Capital®
a Matrix Financial Solutions affiliate company
10 Years of Excellence in Wealth Management

RETIREMENT PLAN SOLUTIONS

RETIRETOOL(K)IT AND CO-FIDUCIARY SERVICES

Prima Capital's web technology, objective research, and well-defined due diligence process can help enhance your retirement investment program.

In partnership with Matrix Financial Solutions, Prima Capital powers non-fiduciary and co-fiduciary solutions that are ideal for defined contribution plan advisors, brokers, third-party administrators, and recordkeepers. The RetireTool(k)it™ web technology delivers an array of information and tools that make it easier for advisors and sponsors to monitor the health and direction of their programs, including:

- Proposal Generation Tools
- Investment Policy Statements
- Annual Plan Demographic Reports
- Quarterly Fund Reviews and Reports
- Mutual Fund Research and Recommendations

RETIRETOOL(k)IT

As an independent provider of research and advisory services, Prima Capital is an ideal resource or service provider for defined contribution plan advisors, brokers, third-party administrators, and recordkeepers. The RetireTool(k)it helps retirement plan professionals deliver prudent investment advice and can enable plan sponsors to better meet their fiduciary obligations to plan participants.

MG TRUST RETIREFOCUS FUNDS

Prima Capital serves as the Portfolio Strategist to the MG Trust RetireFocus Funds™, a series of diversified investment funds designed for investors with a specific time horizon for retirement. Housed in collective investment trusts sponsored and maintained by MG Trust Company, LLC, the Funds effectively leverage Prima's research capabilities and are built from a pure open architecture platform.

Designed to be comprehensive investment solutions for participants in defined contribution plans, the Funds use strategic and institutional-grade asset allocation as well as core-satellite portfolio construction principles to match the appropriate level of risk across each stage of a plan participant's life. The RetireFocus Funds represent an excellent solution for firms looking to provide an easy to use, professionally managed, comprehensive portfolio solution for 401(k) plan sponsors and participants, and include:

MG Trust RETIREFOCUS(funds)

- 100% open architecture platform
- Ongoing monitoring of managers and periodic portfolio rebalancing
- Low fund expenses and full disclosure of fees
- High-level research and due diligence typically available exclusively to major banks and financial institutions
- A core-satellite portfolio construction approach that uses both passive and active management to target positive real returns in excess of inflation

RetireFocus(funds) are not available to retail investors. MG Trust Company, LLC offers collective trust funds to qualified retirement plans and their participants in connection with trust and custody services. Units of any Fund are not deposits or obligations of, or guaranteed by, any bank, including MG Trust Company, LLC or affiliated banks, nor are they insured by the Federal Deposit Insurance Corporation, the Federal Reserve Board, or any other agency. Units of any Fund have not been registered with or approved by the U.S. Securities and Exchange Commission, or any securities regulatory authority of any state, nor has the SEC or such commission or regulatory authority passed upon the accuracy or adequacy of the Declaration of Trust or any other related governing document. An investment in a Fund involves investment risk, including the possible loss of principal, due to fluctuations in a Fund's net asset value. Review all relevant information before investing.