

Get out from under the administrative burden of managing retirement and benefit plans



FREE UP MORE TIME TO DRIVE REVENUE

To thrive in today's fiercely competitive legal marketplace, law firms need to offer new services, attract top talent and provide benefits packages that will retain them. This takes time—but all too often you are tied up with time-consuming tasks to facilitate the retirement plans for clients and your firm's employees.

Matrix Trust Company (Matrix), a Broadridge Financial Solutions company, can help. Our solutions for employee benefits plans can streamline and consolidate custodial management, so you have the time you need to focus on key practice areas of revenue.

LET US DO THE HEAVY LIFTING FOR YOU

Matrix partners with financial and other professionals from plan inception and day-to-day administration through extraordinary events such as corporate strategic transactions. We offer full-service directed trustee and custodial services, including benefit payment processing, participant tax reporting and preparation of the Form 1041 Grantor Tax Letter for non-qualified plans. Outsourcing with Matrix facilitates the exchange of retirement plan data and helps you:

- Maintain relationships
- Increase efficiencies
- Reduce costs
- Improve oversight
- Reduce risk of errors

ADVANCED PLATFORM FACILITATES AUTOMATION

The Matrix Trust and Custodial Platform makes it easy to support your and your clients' retirement and employee benefit plans. Along with data aggregation, performance reporting, and specialized services needs such as unitization services, open architecture investment platform and investments held at investment managers and brokerage accounts, Matrix offers the benefit of an independent and experienced corporate trustee.

Designed for qualified and non-qualified plans, this low-cost, highly efficient solution automates and optimizes trust and custodial services. A state-of-the-art trust accounting system facilitates exchange of all transactional data required for both trust services and trading functions. Platform features include:

- Trust and custody services
- Statements and reporting
- Transparent interface
- Cost-effective administration
- Support of your preferred self-directed brokerage accounts and their reporting requirements

MANAGE TRUST AND CUSTODY SERVICES FOR RETIREMENT PLANS ON A SINGLE PLATFORM

With our specialized platform, Matrix facilitates the unique retirement needs of law firms and their clients:

• Traditional pension and profit-sharing plans

We provide directed trustee services for cash balance, traditional pension or profit-sharing plans of law firms.

Assets can be in the custody of Matrix as the trustee, or held directly with the firm's investment manager to facilitate trading efficiencies. We can provide trust reporting via our automated Advent non-custodial link when assets are held away.

• Qualified defined contribution plans

Matrix offers directed trustee services for qualified defined contribution plans of law firms, especially those that utilize managed account options or self-directed brokerage accounts that are held at multiple custodians or brokerage firms. Unitization services are also available to streamline the use of managed accounts within a daily valuation retirement plan.

Matrix can serve as a corporate trustee for the plan. As a corporate trustee, Matrix will provide quarterly reporting as well as a certified annual report to assist the firm with 5500 readiness or audit requirements.

• Rabbi trusts

We also specialize in rabbi trustee services for executive benefit plans of law firms and/or their clients, with complete flexibility as to informal funding vehicles, with no proprietary investment fund offerings or required investments, along with benefit payment processing and tax reporting services.

• Non-qualified plans

Matrix can support non-qualified plans from inception through change in control, M&A and other strategic transactions. We provide both directed and discretionary trustee services for non-qualified plans.

PUT THE BROADRIDGE ADVANTAGE TO WORK FOR YOUR FIRM

Matrix Trust Company is part of Broadridge Financial Services, a global FinTech leader providing communications, technology, data and analytics solutions.

Broadridge, a global Fintech leader with over \$4 billion in revenues and part of the S&P 500® Index, provides communications, technology, data and analytics. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth.

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BROADRIDGE BY THE NUMBERS



Investment grade, **\$14+ billion** market capitalization



\$4.4 billion in revenue



Publicly traded company on the NYSE and a part of the S&P500



11,000+ employees

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Contact us today for a complimentary consultation:

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