

# Integration Options: Recordkeepers

## MATRIX<sup>®</sup> FINANCIAL SOLUTIONS

Matrix provides independent trust, custody and directed trustee services to independent recordkeepers, trust companies, and directly to plans. Advisors may have plans across several administration providers, below you will find a list of recordkeepers that currently use Matrix and are available for integration\*.

Use this list to link plans under your advisement to the Fiduciary Focus Toolkit, Matrix Business Intelligence dashboard or to learn more about these providers' services. Reach out to inquire about firms not listed.

*\* This is for informational purposes only and does not constitute a recommendation.*

Ready for Next

401go	CapAcuity
ABG Houston	Coastal Daily Balance, LLC.
ABG Pentegra	Columbia Benefits Consultants
ABG Rocky Mountain	Compensation and Capital
ABG Southwest, LLC (formerly REDW)	Correll & Company
Accurecord	CUNA Mutual Insurance Society
AdvantageResource	DCM
Alerus Retirement Solutions	Deferral.com
American Trust Retirement	Devenir Group, LLC
Ameritas Life Insurance Corp	Digital Retirement Solutions Inc (DRS)
AMI Benefit Administrators	Educators Benefit Consultants, LLC
Aon Hewitt	Employee Fiduciary Corporation
Ascensus	Empower (Formerly Great West Financial)
Aspire - Investlink	Envoy TPA
ATR, Inc.	EPIC Advisors
Austin Capital Retirement Plan Services, LLC (formerly WPS)	ePlan Services, Inc.
Benefit Consultants Group (BCG)	Expert Plan
Benefit Management	Findley Davies
Benefit Plans Administrative Services (BPAS)	FM International
Benefit Solutions Inc. - WV	FM International Services
Benefit Strategies	Fringe Benefit Admin
BeneSys	Fringe Benefits Design of MN (FBD)
Blazek & Associates Retirement Services, Inc.	Future Planning Associates
BlueStar Retirement Services	FutureBenefits of America
California Pension Administrators	FuturePlan by Ascensus (formerly 401k Plus)

Gasaway Investment Advisors, Inc	McCready and Keene
Great West - Settlement Only	MidAmerica Administrative & Retirement Solutions, LLC
HCI-EBS (Investlink)	Milliman Defined Benefit
Howard Simon & Associates	Milliman USA-Omni
Human Interest	Milliman USA-Seattle
ICMA-RC	MissionSquare Retirement
INVESTIFIN, LLC	Money Intelligence (Denarius Capital Advisors d/b/a Money Intelligence)
Invisor Solutions LLC	Morgan White Group (formerly Independent Pension Solutions)
iraLogix, LLC	Mullin TBG
JNT Resources	Mullin TBG - Rev Share
Journey (formerly MEBS-Michigan Employee Benefit Services)	Mutual of Omaha Investment
JP Morgan	MVP Plan Administrators, Inc.
JP Morgan Everyday 401k - SS&C	New England Pension Systems
July Business Services	Newport Group, Inc. - CA (formerly Verisight, Inc.)
Kassouff Retirement Plan Services	Northeast Retirement Services
Kaufman and Goble	Northwest Plan Services (formerly CDM)
Kravitz, LLC (formerly Louis Kravitz & Associates)	NTC - NextStep
Ktrade	NW PLANS
Leading Retirement Solutions	Nyhart
Lehman: NO TPA	Nyhart - CH Dean
Lifetime Benefit Solutions, Inc. (EBS)	OARS - Passive
Lincoln Ret Svcs Corp	O'Connell Pensions
Loren D Stark Company	Octave Wealth
LT Trust	OneAmerica Retirement Services
M Benefit Solutions	OneAmerica WI Office
MassMutual	Orion Portfolio Solutions, LLC (formerly FTJ Fundchoice)

P&A Administrative Services	Retirement Planners & Administrators, Inc.
PAI Trust Company--Non Custodial	Retirement Strategies Group (RSG)
Pangburn Group	Retirement, LLC (formerly Compensation Planning)
Pattillo, Brown & Hill LLC	RHI Acquisition LLC (formerly America's 401(k) LLC)
Pelion Benefits	Rogers Wealth Group, Inc.
PENCAL Nonqualified	Rollover Systems (0667)
PENCAL Qualified	RPG Consultants
PenServ Plan Ser 403(B)	Schneider, Male & Strakowski CO E.A (SMS)
Pension Corp of America (PCA)	SEBS - Southeastern Employee Benefit Services
Pension Parameters Financial Services	Security Benefit
Pensys Inc	Sentinel Benefits
Premier Pension Solutions	Sheakley Pensions
Primark Benefits	Slavic401k
Professional Capital Services (PCS)	Spectrum Employee Benefits – SRT
Professional Capital Services (PCS)-Matrix	Spectrum Pension Consultants
ProTPA	Stanley Benefits
QBC, Inc. (Qualified Benefits Consultants)	Sunwest Pensions (SRT)
Quorum Consulting Group	Swerdlin & Company
Randall Hurley	T Rowe (DST)
Retirement Administration Inc.	Tag Financial Services, LLC
Retirement Direct	TASC (formerly Genesis Employee Benefits)
Retirement Horizons	TPP Retirement Plan Services, LLC
Retirement Plan Administrators, LLC (formerly Qualified Plan Administrators, Inc. /QPA)	TRI-AD
Retirement Plan Company TRPC (formerly LBMC)	Ubiquity Retirement & Savings (Decimal, Inc)
Retirement Plan Consultants - Relius (RPC)	UBS: McCready & Keen
Retirement Plan Services of Phoenix, Inc. (formerly Personalized Pensions, TDH)	UBS: PB&H

<b>UBS: Premier Pen Sol</b>	<b>Vestwell</b>
<b>UBS: Ret Strat Inc.</b>	<b>Voya Trust Company</b>
<b>UBS: Sheakley</b>	<b>Web401K.com</b>
<b>UBS: Wachovia</b>	<b>Weiss Group (The)</b>
<b>Univest Retirement</b>	<b>Werntz &amp; Associates</b>
<b>Univest Retirement</b>	<b>Westport Worldwide</b>
<b>Vantage Benefits</b>	<b>Zenith American Solutions</b>

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