

# HCM-GUIDED RETIREMENT RECORD KEEPER LIST



## HCM-GUIDED RETIREMENT PLATFORMS



**Broadridge**

**Matrix**  
TRUST COMPANY



Customer/Record Keeper Name	Provider	City	State
1st Source	Mid Atlantic Trust Company	South Bend	IN
401K Direct	Mid Atlantic Trust Company	Campbell	CA
Access Retirement Plan Resources	Mid Atlantic Trust Company	Waverly	IA
Admin Solutions	Mid Atlantic Trust Company	Haddonfield	NJ
Alerus	Mid Atlantic Trust Company	Arden Hills	MN
Allen, Gibbs & Houlik, L.C.	Mid Atlantic Trust Company	Wichita	KS
Alliance Benefit Group - Rocky Mountain	Mid Atlantic Trust Company	Salt Lake City	UT
Alliance Benefit Group of Houston	Mid Atlantic Trust Company	Houston	TX
Alliance Benefit Group of IL	Mid Atlantic Trust Company	Peoria	IL
Alliance Benefit Group of MI	Mid Atlantic Trust Company	Bingham Farms	MI
Alliance Pension	Mid Atlantic Trust Company	Deerfield	IL
American Trust Retirement	Mid Atlantic Trust Company	Dubuque	IA
AMI Benefit Plan Administrators, Inc	Mid Atlantic Trust Company	Cortland	OH
APA Benefits	Mid Atlantic Trust Company	Sandy	UT
APB Financial Group	Mid Atlantic Trust Company	Wexford	PA
Aris Corporation	Mid Atlantic Trust Company	State College	PA
Ascensus	Mid Atlantic Trust Company	Dresher	PA
ASPire	Mid Atlantic Trust Company	St. Petersburg	FL
Aon Trust Company	Mid Atlantic Trust Company	Lincolnshire	IL
Banco Popular de Puerto Rico	Mid Atlantic Trust Company	San Juan	PR
Beneco	Mid Atlantic Trust Company	Scottsdale	AZ
Benefit Consultant Group	Mid Atlantic Trust Company	Riverside	NJ
Benefit Consultants (WAKM)	Mid Atlantic Trust Company	Birmingham	AL
Boetger Retirement Plan Services	Mid Atlantic Trust Company	Erie	PA
BlueStar Retirement Services, Inc	Mid Atlantic Trust Company	Ponte Vedra Beach	FL
Cambridge Investment Research	Mid Atlantic Trust Company	Fairfield	IA
Caribbean Pension Consultants	Mid Atlantic Trust Company	Boca Raton	FL

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Certified Benefits Corp	Mid Atlantic Trust Company	Altamonte Springs	FL
Chemical Bank	Mid Atlantic Trust Company	Midland	MI
CMC Interactive	Mid Atlantic Trust Company	New York	NY
Coastal Daily Balance	Mid Atlantic Trust Company	Boalsburg	PA
Columbia Benefits	Mid Atlantic Trust Company	Columbia	MD
DailyAccess (Now Newport)	Mid Atlantic Trust Company	Mobile	AL
Definiti, LLC	Mid Atlantic Trust Company	Woodlands	TX
EPIC Advisors	Mid Atlantic Trust Company	Rochester	NY
Findley Davies	Mid Atlantic Trust Company	Columbus	OH
First Mercantile Trust Company	Mid Atlantic Trust Company	Memphis	TN
Flexible Benefits	Mid Atlantic Trust Company	Akron	OH
FutureBenefits	Mid Atlantic Trust Company	Arlington	TN
Guardian	Mid Atlantic Trust Company	New York	NY
Heard, McElroy & Vestal	Mid Atlantic Trust Company	Shreveport	LA
Heartland Financial (Dubuque Bank)	Mid Atlantic Trust Company	Dubuque	IA
Heritage	Mid Atlantic Trust Company	Woodbury	NY
Hooker & Holcombe	Mid Atlantic Trust Company	West Hartford	CT
Independent Pension Solutions	Mid Atlantic Trust Company	Jackson	MS
INTRUST	Mid Atlantic Trust Company	Wichita	KS
July Business Services	Mid Atlantic Trust Company	Waco	TX
K Trade	Mid Atlantic Trust Company	Plymouth	IN
Leading Retirement Solutions	Mid Atlantic Trust Company	Seattle	WA
Lincoln Financial Group	Mid Atlantic Trust Company	Radnor	PA
LT Trust	Mid Atlantic Trust Company	Denver	CO
Millikin Mandt	Mid Atlantic Trust Company	Seattle	WA
MutualBank	Mid Atlantic Trust Company	Carmel	IN
Mutual of America	Mid Atlantic Trust Company	New York	NY
Newport Group	Mid Atlantic Trust Company	St. Petersburg	FL
Noble Davis	Mid Atlantic Trust Company	Solon	OH
Northeast Retirement Services	Mid Atlantic Trust Company	Woburn	MA
P&A Retirement Services	Mid Atlantic Trust Company	Buffalo	NY
Pac Pensions	Mid Atlantic Trust Company	Lake Forest	CA
Pattillo, Brown & Hill	Mid Atlantic Trust Company	Waco	TX
Paychex	Mid Atlantic Trust Company	W. Henrietta	NY
Pension Corp of America	Mid Atlantic Trust Company	Cincinnati	OH

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Pension, Inc.	Mid Atlantic Trust Company	Green Bay	WI
Pensys	Mid Atlantic Trust Company	Sacramento	CA
Pentegra	Mid Atlantic Trust Company	White Plains	NY
Retirement Investment Administrators	Mid Atlantic Trust Company	Dallas	TX
Retirement LLC - Series Two	Mid Atlantic Trust Company	Northbrook	IL
Retirement Options LLC	Mid Atlantic Trust Company	East Lansing	MI
Retirement Planners & Administrators	Mid Atlantic Trust Company	Falls Church	VA
RiversEdge	Mid Atlantic Trust Company	Pittsburgh	PA
RPG Consultants	Mid Atlantic Trust Company	New York	NY
Save Daily	Mid Atlantic Trust Company	San Diego	CA
Schenck Retirement Plan Solutions	Mid Atlantic Trust Company	Appleton	WI
Securian	Mid Atlantic Trust Company	St. Paul	MN
Sentinel Benefits Group, Inc	Mid Atlantic Trust Company	Reading	MA
Slavic Integrated Administration	Mid Atlantic Trust Company	Boca Raton	FL
Summit Benefit Solutions Inc	Mid Atlantic Trust Company	Mansfield	OH
The Payroll Company (Vesdata)	Mid Atlantic Trust Company	Middleton	WI
The Retirement Plan Co.	Mid Atlantic Trust Company	Brentwood	TN
The Standard	Mid Atlantic Trust Company	Portland	OR
TRI-AD	Mid Atlantic Trust Company	Escondido	CA
Turning Point Associates	Mid Atlantic Trust Company	Swedesboro	NJ
Unified Trust	Mid Atlantic Trust Company	Louisville	KY
Weiss Group	Mid Atlantic Trust Company	Des Plaines	IL
Wertz & Assoc.	Mid Atlantic Trust Company	Shreveport	LA
Wertz (LR)	Mid Atlantic Trust Company	Little Rock	AR
Wipfli	Mid Atlantic Trust Company	Eau Claire	WI
401go	Broadridge   Matrix Trust Company		
401K-Direct	Broadridge   Matrix Trust Company		
401kdirectpro, Inc.	Broadridge   Matrix Trust Company		
ABG Houston	Broadridge   Matrix Trust Company		
ABG Illinois	Broadridge   Matrix Trust Company		
ABG Michigan	Broadridge   Matrix Trust Company		
ABG Pentegra	Broadridge   Matrix Trust Company		
ABG Rocky Mountain	Broadridge   Matrix Trust Company		
ABG Southwest, LLC (formerly REDW)	Broadridge   Matrix Trust Company		
Accurecord	Broadridge   Matrix Trust Company		

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AdvantageResource	Broadridge   Matrix Trust Company		
Allen, Gibbs, Houlik	Broadridge   Matrix Trust Company		
America's Family Benefit Plan	Broadridge   Matrix Trust Company		
Ameritas Life Insurance Corp	Broadridge   Matrix Trust Company		
AMI Benefit Administrators	Broadridge   Matrix Trust Company		
Aspire	Broadridge   Matrix Trust Company		
ATR,Inc.	Broadridge   Matrix Trust Company		
Austin Capital Retirement Plan Services, LLC (formerly WPS)	Broadridge   Matrix Trust Company		
Benefit Consultants Group (BCG)	Broadridge   Matrix Trust Company		
Benefit Solutions Inc. - WV	Broadridge   Matrix Trust Company		
Benetech Inc	Broadridge   Matrix Trust Company		
Billings and Company	Broadridge   Matrix Trust Company		
Blade Benefit Consulting, LLC (formerly CPActuaries, VPC Group)	Broadridge   Matrix Trust Company		
BlueStar Retirement Services	Broadridge   Matrix Trust Company		
California Pension Administrators	Broadridge   Matrix Trust Company		
CDM Retirement Consultants (Northwest Plan Services)	Broadridge   Matrix Trust Company		
CMC Pension Professionals	Broadridge   Matrix Trust Company		
Coastal Daily Balance, LLC.	Broadridge   Matrix Trust Company		
Columbia Benefits Consultants	Broadridge   Matrix Trust Company		
Compensation Strategies Group	Broadridge   Matrix Trust Company		
Correll & Company	Broadridge   Matrix Trust Company		
CPI Qualified Plans/CUNA	Broadridge   Matrix Trust Company		
DataPath, Inc.	Broadridge   Matrix Trust Company		
DCM	Broadridge   Matrix Trust Company		
Devenir Group, LLC	Broadridge   Matrix Trust Company		
Digital Retirement Solutions Inc (DRS)	Broadridge   Matrix Trust Company		
EB Management Company	Broadridge   Matrix Trust Company		
Educators Benefit Consultants, LLC	Broadridge   Matrix Trust Company		
Employee Benefit Resources (EBR)	Broadridge   Matrix Trust Company		
Employee Fiduciary Corporation	Broadridge   Matrix Trust Company		
Envoy TPA	Broadridge   Matrix Trust Company		
EPIC Advisors	Broadridge   Matrix Trust Company		
Equi-Path (Plan Connect, formerly AXA)	Broadridge   Matrix Trust Company		

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Findley Davies	Broadridge   Matrix Trust Company		
Flexible Benefit Systems	Broadridge   Matrix Trust Company		
FM International	Broadridge   Matrix Trust Company		
Future Planning Associates	Broadridge   Matrix Trust Company		
Genesis Employee Benefits	Broadridge   Matrix Trust Company		
HCI-EBS	Broadridge   Matrix Trust Company		
Heard, McElroy & Vestal	Broadridge   Matrix Trust Company		
Horace Mann Educators Corp.	Broadridge   Matrix Trust Company		
ICMA-RC	Broadridge   Matrix Trust Company		
Independent Pension Solutions	Broadridge   Matrix Trust Company		
Ingham Group	Broadridge   Matrix Trust Company		
Inspira FS, Inc.	Broadridge   Matrix Trust Company		
Interactive Retirement Systems (IRS)	Broadridge   Matrix Trust Company		
Invisor Solutions LLC	Broadridge   Matrix Trust Company		
Journey (formerly MEBS-Michigan Employee Benefit Services)	Broadridge   Matrix Trust Company		
July Business Services	Broadridge   Matrix Trust Company		
Katz Sapper & Miller, LLP (KSM)	Broadridge   Matrix Trust Company		
Ktrade	Broadridge   Matrix Trust Company		
Lifetime Benefit Solutions, Inc. (EBS)	Broadridge   Matrix Trust Company		
Loren D Stark Company	Broadridge   Matrix Trust Company		
LT Trust	Broadridge   Matrix Trust Company		
McCready & Keene	Broadridge   Matrix Trust Company		
Mutual of Omaha	Broadridge   Matrix Trust Company		
Newport Group, Inc. - CA, FL (formerly Verisight, Inc.)	Broadridge   Matrix Trust Company		
Northeast Retirement Services	Broadridge   Matrix Trust Company		
O'Connell Pensions	Broadridge   Matrix Trust Company		
O'Neil & Associates	Broadridge   Matrix Trust Company		
P&A Administrative Services	Broadridge   Matrix Trust Company		
PAI Trust Company--Non Custodial	Broadridge   Matrix Trust Company		
Pangburn Group	Broadridge   Matrix Trust Company		
Pattillo, Brown & Hill LLC	Broadridge   Matrix Trust Company		
Pelion Benefits	Broadridge   Matrix Trust Company		
Pen Cal	Broadridge   Matrix Trust Company		
PenServ	Broadridge   Matrix Trust Company		

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Pension Corp of America (PCA)	Broadridge   Matrix Trust Company		
Pension Parameters Financial Services	Broadridge   Matrix Trust Company		
Pensys Inc	Broadridge   Matrix Trust Company		
Personalized Pensions (TDH)	Broadridge   Matrix Trust Company		
Premier Pension Solutions	Broadridge   Matrix Trust Company		
Primark Benefits	Broadridge   Matrix Trust Company		
Professional Capital Services, LLC (PCS)	Broadridge   Matrix Trust Company		
ProTPA	Broadridge   Matrix Trust Company		
QBC, Inc. (Qualified Benefits Consultants)	Broadridge   Matrix Trust Company		
Qualified Plan Administrators, Inc. (QPA)	Broadridge   Matrix Trust Company		
Quorum Consulting Group	Broadridge   Matrix Trust Company		
Randall & Hurley, Inc.	Broadridge   Matrix Trust Company		
Retirement Direct	Broadridge   Matrix Trust Company		
Retirement Investment Administrator	Broadridge   Matrix Trust Company		
Retirement Plan Company TRPC (formerly LBMC)	Broadridge   Matrix Trust Company		
Retirement Plan Consultants - Relius (RPC)	Broadridge   Matrix Trust Company		
Retirement Planners & Administrators, Inc.	Broadridge   Matrix Trust Company		
Retirement Strategies Group (RSG)	Broadridge   Matrix Trust Company		
Retirement Strategies Inc. (RSI)	Broadridge   Matrix Trust Company		
Retirement, LLC (formerly Compensation Planning)	Broadridge   Matrix Trust Company		
RPG Consultants	Broadridge   Matrix Trust Company		
SD Advantage Retirement Solutions, LP	Broadridge   Matrix Trust Company		
SEBS - Southeastern Employee Benefit Services	Broadridge   Matrix Trust Company		
Sentinel Benefits	Broadridge   Matrix Trust Company		
Sheakley Pensions	Broadridge   Matrix Trust Company		
Slavic401k	Broadridge   Matrix Trust Company		
Spectrum Employee Benefits	Broadridge   Matrix Trust Company		
Spectrum Pension Consultants	Broadridge   Matrix Trust Company		
Stonewater Wealth Management	Broadridge   Matrix Trust Company		
Summit Benefit Solutions	Broadridge   Matrix Trust Company		
Sunwest Pensions (SRT)	Broadridge   Matrix Trust Company		

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Trautmann & Maher	Broadridge   Matrix Trust Company		
Tri-Ad Actuaries	Broadridge   Matrix Trust Company		
Ubiquity Retirement & Savings (Decimal, Inc)	Broadridge   Matrix Trust Company		
Univest Retirement	Broadridge   Matrix Trust Company		
Warren Averett Benefit Consultants, LLC	Broadridge   Matrix Trust Company		
Weiss Group (The)	Broadridge   Matrix Trust Company		
Wertz & Associates	Broadridge   Matrix Trust Company		

## DISCLOSURE

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