



Introducing ModelxChange®

A Seamless Model Management Platform for the 401(k) Marketplace

Mid Atlantic Trust Company (MATC), with the assistance of other companies within the Mid Atlantic Capital Group family, is pleased to offer the ModelxChange® platform, the first of its kind to allow 401(k) professionals to seamlessly incorporate investment models into a retirement plan, all through a single, web-based interface.

ModelxChange® is ideal for those Professional Money Managers, Investment Advisors, and Plan Record Keepers who want to stay on the forefront of the 401(k) marketplace by providing plan sponsors and participants a cutting edge managed account solution.

Money Managers

ModelxChange® uniquely provides Money Managers with a single system for the creation, execution, and on-going management of mutual fund and ETF investment models for the 401 (k) marketplace. Through this easy-to-use interface, managers can set up and manage their investment models, and then deliver those models and the investment changes to each individual

401(k) plan as adjustments are made to the model — without having to log into each separate record keeping system every time a change is made.

Through ModelxChange®, Money Managers can also set security and cash targets, in addition to specific investment exclusions requested by the plan fiduciary. All of the plan flows, asset levels, and detailed information related to the plan are right at their fingertips through the easy to navigate website. Additionally, management fees can be accrued daily and automatically paid monthly.

Investment Advisors

Plan Investment Advisors who do not manage their own models can leverage a stable of third party managers with proven track records to help differentiate their practices. ModelxChange® provides investment advisors with access to “best of breed” money managers, and simplifies the due diligence screening process by providing manager profiles, descriptions, performance data, and other details of each model — reducing the amount



Money Managers can set-up, manage and execute their models all in one place, without having to login to each individual record keeping system

of time required to review the myriad of data in order to make an effective choice for a client.

Plus, with the seamless integration ModelxChange® provides for the management of investment models, advisors can be assured that their client's plan is always in-sync with the Model Manager's recommendation.

Third Party Plan Record Keepers

Historically, the process of coordinating all of the moving parts required for Plan Record Keepers to effectively manage an investment model within a retirement plan has been a tedious process. Each time the advisor calls to submit a change to the investment model, it results in a stream of trades and record adjustments to keep the plan in compliance.

ModelxChange® streamlines this process by seamlessly coordinating all the moving parts required to handle a model within a retirement plan. This includes not only syncing the model with the plan accounts — including automatically handling specific investment exclusions — but also providing reporting metrics and all the necessary tools Advisors have come to

expect so that they can easily fulfill their fiduciary responsibility.

Fact Sheets and Disclosure

In light of recent DOL regulations, incorporation of disclosure data and fact sheets is a key component of the ModelxChange® platform. Mid Atlantic satisfies all of these requirements by calculating returns, expense ratios, turnover, benchmark data, and other pertinent information for all full service managers. This information is delivered to both plan sponsors and participants via composite and plan specific fact sheets, in addition to data feeds to all of our Record Keeper partners.

If you are a Professional Money Manager, Plan Investment Advisor, or Third Party Plan Record Keeper and would like a demonstration on this unique service, please contact your Mid Atlantic representative by calling

1-800-693-7800 today



Mid Atlantic Capital Group
1251 Waterfront Place, Suite 510
Pittsburgh, PA 15222-4236
800-693-7800
www.macg.com

Mid Atlantic Trust Company
330 South Poplar Avenue
Pierre, SD 57501
800-693-7800
www.macg.com



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