

# Get to Know the Partners of Open Choice Retirement



Custodian



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For more than 30 years, Mid Atlantic Capital Group, Inc. (Mid Atlantic) has supported investment professionals and financial organizations with tools to help attract, grow, and retain assets. Mid Atlantic as a whole serves accounts that represent over \$45 billion in customer assets. The group is privately held and includes:

- Mid Atlantic Capital Corporation, a registered FINRA member broker-dealer
- Mid Atlantic Financial Management, Inc., an SEC-registered investment adviser
- Mid Atlantic Trust Company, a non-depository trust company

## MATC Offerings

Mid Atlantic Trust Company clears and settles over one million fund transactions per month through the National Securities Clearing Corporation (NSCC) for our TPA, insurance, and trust company partners.

Our professional team members safekeep the plan's holdings which are segregated from the general assets and liabilities of the trust organization.

Our web-based trust accounting and custodial system provides real-time online access to cash and investment reporting for plan sponsors and TPAs, advisors, auditors, and other interested parties.

MATC believes in the segregation of plan duties and so provides only custody and related services to put in place the all-important check and balance that so many "bundled" retirement plans lack.