# MILLENNIUM TRUST COMPANY

## AUTOMATIC ROLLOVER E-KIT

Thank you for choosing Millennium Trust Company. We strive to make your Automatic Rollover experience as easy as 1-2-3!

### 1. SIGN AN AUTOMATIC ROLLOVER SERVICES AGREEMENT

Our Automatic Rollover services begin with providing an Automatic Rollover Services Agreement to the plan sponsor. It is attached electronically and should be signed by the Plan Sponsor and returned to Millennium Trust via email or fax.

### 2. PROVIDE PARTICIPANT INFORMATION

To ensure the security of your participant data, we recommend uploading your data to Millennium Trust via our ARP Portal. We provide a simple Excel spreadsheet (the Millennium EZ Rollover Format Sample Worksheet) located on our website as well as the ARP Portal (https://map.mtrustcompany.com).

Participant information includes the participant's name, address, social security number, date of birth, the dollar amount and plan name. With this information, we automatically open IRA accounts and populate the Adoption Agreement which is sent to the participant with the Welcome Kit.

Contact a Relationship Manager to request portal access.

### 3. TRANSFER PARTICIPANT FUNDS TO MILLENNIUM TRUST

We prefer to receive account balances via wire transfer or ACH, but will accept check(s) distributions also. The plan sponsor and/or record keeper will receive confirmation when participant IRA accounts are opened.

### ENCLOSED IN THIS KIT:

- Program Summary: A Comprehensive Solution
- Automatic Rollover Services Agreement
- Providing Funding and Participant Data
- Sample Notification Letters

**To learn more about Millennium Trust Company and the services we provide, please contact us today.**

### AUTOMATIC ROLLOVER PROGRAM SERVICES

- ACTIVE PLANS
- TERMINATING PLANS
- ABANDONED PLANS
- UNCASHED CHECKS
- WIND UP SERVICES
- QTA SERVICES
- PARTICIPANT SEARCH

### CONTACT US TODAY

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