AUTOMATIC ROLLOVERS

TOP 5 REASONS YOU'LL SELECT MILLENNIUM AS YOUR IRA PROVIDER

DO WHAT YOU DO BEST, AND PUT US TO WORK ON THE REST.

1. INDEPENDENT AND SECURE

Millennium Trust is an independent custodian. In our view, the objective is simple: focus on the client. We do not compete for your client's business. Despite difficult economic times, Millennium Trust continues to grow. Today we administer over 175,000 accounts with total assets under custody exceeding $5 billion. We have no debt.

2. EXPERTISE

Since 2005, we have been providing automatic rollover solutions to plan sponsors, TPAs and record keepers. Millennium Trust offers a flexible solution that can accommodate all rollovers including active, terminating and abandoned plans. We have agreements with over 12,000 plan sponsors to use our Automatic Rollover solution.

3. SERVICE AND SUPPORT

A dedicated Relationship Manager will guide you through the process and provide you with a solution designed for your organization. We can save you time, money and reduce fiduciary risk, while preserving participants' retirement account savings.

Participants will have access to our automatic rollover client service team via phone, e-mail, fax or in person. Each team member is experienced with IRAs and well trained on IRS distribution rules. Our client service team utilizes a state of the art trust accounting system that keeps track of the underlying investments, transactions and tax reporting.

Each IRA owner receives a Welcome Kit and is offered web access to account information and annual statements. We provide tax reporting including Form 5498.

4. COMPLETE PACKAGE

Our services are comprehensive and offer significant flexibility. We are uniquely equipped to easily accommodate a high volume of small accounts for operational ease. Rollovers are invested initially in an FDIC insured money market vehicle and participants have a full range of investment options and tools. When we are provided out-of-date addresses, we have external search tools, including the Rick Compliance Performance Solutions, LLC, to find missing participants.

Security and confidentiality are critical elements to us. Millennium Trust's innovative technology solution offers the highest level of data integrity. Our technology securely interfaces with all retirement record keeping systems. We gather participant information via password protected e-mail, secure portal or through 128-bit encrypted file format.

5. REASONABLE FEES

Millennium Trust is committed to providing our Automatic Rollover Solution at no cost to plan sponsors and TPAs. Our fees are charged to the participant and are very reasonable.

CONTACT US TODAY Please call or visit our web site at www.mtrustcompany.com.

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COMPANY PROFILE

Millennium Trust Company is an industry leader in administrative and custodial services. Millennium custodies alternative and traditional assets in IRAs, Solo 401(k)s and custody accounts, offers private fund custody services, customized Automatic Rollover programs, provides integrated Health Savings Account solutions and designs unique trading platforms for Investment Advisors.