

# ALTERNATIVE INVESTMENTS IN SELF-DIRECTED IRAs

## AN OPPORTUNITY FOR FUNDING CAPITAL

### BEYOND TRADITIONAL

While many financial institutions can handle stocks, bonds and mutual funds, Millennium Trust is able to go far beyond the standard menu. We are one of the few independent trust companies that specialize in the custody of alternative assets in addition to traditional investments. In fact, alternative investments are our specialty, and we offer strong expertise and knowledge in this growing asset class. Working with Millennium Trust gives you the widest range of asset options.

### IRAs AND ALTERNATIVE INVESTMENTS

There are over \$4.7 trillion invested in IRAs and annual rollovers into IRAs are expected to grow steadily to \$430 billion by 2015. Today's investors are increasingly seeking new ways to expand their portfolios and diversify their investment holdings. Traditional diversification used to mean a combination of stocks, bonds, mutual funds and cash, but the evolving market conditions are allowing investors to expand their strategies beyond these traditional asset classes to include alternative investments such as real estate, hedge funds, futures, private equity, mortgage/trust deeds, and more.

Many investors also are learning that under current Internal Revenue Code, virtually any investment can be held in a 401(k), subject to the terms of each plan, and the same for IRAs, except for life insurance and collectables other than certain types of permitted coins and precious metals.

All of these factors are contributing to the increase of alternative assets being used in creating a more diversified portfolio. As investors seek out more alternative investment opportunities, the more important it becomes to use a custodian that can provide expert custody of those alternative assets.

### MILLENNIUM TRUST AS A VALUED CUSTODIAN

Millennium Trust brings years of experience working with alternative investments and has expertise in dealing with both service providers and investors. Millennium Trust has dedicated and knowledgeable operations and client service personnel ready to assist you. Let us help you grow your business.

You can rely on Millennium Trust to:

- Establish and maintain IRAs.
- Facilitate investment transactions as directed.
- Track and report all investment activity in the account.
- Ensure accurate and timely recordkeeping on the account.
- Perform IRA Tax reporting.
- Provide expanded FDIC coverage up to \$1 million on cash balances using multiple banks in our Cash Investment Program.

### CONTACT US TODAY

Please call or visit our web site at [www.mtrustcompany.com](http://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.

Millennium Trust performs the duties of a custodian and, as such, does not provide investment advice or sell investments, nor offer any tax or legal advice.