

LOOKING FOR ADDITIONAL SOURCES OF FUNDING FOR FUTURES INVESTMENTS?

FUTURES IN SELF-DIRECTED IRAS

Investors are searching for options to further diversify their retirement investing. Many are learning they have the ability to trade futures, forex, commodities and managed futures in their Individual Retirement Accounts (IRAs). IRAs are tax-advantaged investing vehicles where all income and profits held in the account are normally tax deferred until retirement age when distributions can be taken. Roth IRAs offer the benefit of tax-free distributions if certain conditions are met.

WHAT IS THE BUSINESS OPPORTUNITY?

IRAs currently represent over \$4 trillion of investable assets with approximately 35% of these accounts having balances over \$100,000. According to research performed by the Investment Company Institute, another \$450 billion is expected to roll from employer sponsor plans to IRAs over the next few years. Your current clients more than likely have an IRA or an old 401(k), which provides an additional source to trade futures or forex.

HOW DO CLIENTS FUND IRAS?

IRAs can be funded in several ways:

- Annual IRA contributions
- Transfer from an existing IRA
- Rollover from a 401(k) or qualified retirement plan.

Once funded, the self-directed investor can choose from a wide variety of investments including futures, forex, commodities and managed futures. These investments can be held in Traditional and Roth IRAs, Solo 401(k)s and other qualified retirement plans. In order to maintain the tax-advantaged status of the IRA, all funds must flow through an IRA custodian.

WHY MILLENNIUM TRUST COMPANY?

Millennium Trust is a state-chartered trust company with years of experience providing IRA custodial services to thousands of self-directed investors. Millennium provides expert guidance in

establishing and funding IRAs. Most importantly, Millennium Trust understands your business and the unique requirements of the futures industry.

HOW DO CLIENTS ESTABLISH IRAS?

Investors establish IRAs in 3 easy steps:

- 1 Select you as IB or FCM and complete your account opening paperwork.
- 2 Complete Millennium's account setup, funding and investment direction forms.
- 3 Mail ALL documents to Millennium Trust's Futures Client Service department for processing.

Millennium establishes the IRA and initiates the transfer or rollover of assets. We then work with you to setup and fund the futures or forex account.

HAVE QUESTIONS?

Millennium's Client Service team has the experience and expertise to provide the highest level of service to professionals of the futures, commodities and forex industry. We look forward to working with you.

Futures Client Service Team

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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 cost-effective 403(b) solutions, creates customized Automatic Rollover programs, provides integrated Health Savings Account solutions and designs unique trading platforms for Investment Advisors.

Millennium Trust is not an FCM or an IB firm and does not hold futures positions or the associated funds to margin, guarantee, secure or settle such positions in any IRA. Millennium Trust does not take or place futures trade orders. As a custodian, Millennium Trust Company does not provide tax, legal or investment advice nor does it promote or sell any investment product.