

Alternative Investments in Self-Directed IRAs An Opportunity for Service Providers and Investors

Company Overview

Founded in 2000, Millennium Trust Company is one of the fastest growing custodians in the financial services industry. Millennium administers and custodies alternative and traditional assets in self-directed IRAs and solo 401(k)s, creates customized Automatic Rollover programs, provides integrated Health Savings Account solutions, designs unique trading platforms for Investment Advisors and supplies valued Personal Trust Administration.

Millennium Trust is chartered by the State of Illinois and is examined annually by the Illinois Department of Financial and Professional Regulation. This organization is responsible for the soundness of Illinois state chartered trust companies and their compliance with the Illinois Corporate Fiduciary Act.

IRAs and Alternative Investments

There are over \$4.5 trillion invested in IRAs in the U.S. Annual rollovers into IRA accounts are expected to exceed \$450 billion by the year 2010. In addition to investment in traditional assets, self-directed IRAs represent a vast source of capital that can be invested in various types of alternative or nontraditional assets such as real estate, hedge funds, futures, private equity, mortgage/trust deeds, life settlement contracts and more.

Real estate is the most popular alternative investment choice followed by private equity. Growing rapidly in popularity is investing in hedge funds. Much of the outperformance generated at large endowments versus their smaller peers can be attributed to their investments in hedge funds and private equity.

Millennium Trust as a Valued Partner

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 and become a valued partner.

Millennium Trust Offers:

- Expanded FDIC insurance to \$1 million on cash balances
- Low minimum investment
- Nominal liquidity requirement
- 24 hour response to inquiries
- Online resources for clients and advisors
- Offshore fund capabilities

Contact Us Today

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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.