Millennium Trust Company

About Millennium Trust Company

Overview

Since 2000, Millennium Trust Company has been helping clients become more successful. Far from a typical trust company with a fixed set of offerings, Millennium creates customized, integrated solutions and flexible operational infrastructures to fit our clients' niche business needs.

Millennium continually evolves so that our clients can do the same. We build relationships by working together with clients, understanding their needs and delivering far beyond the expected. Agility, innovation and resourcefulness set Millennium apart. In a fast-changing financial and regulatory landscape, we uncover smart solutions that others may overlook.

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.

Products & Services Overview

Alternative Asset Custodian

Millennium Trust offers advisors and self-directed investors access to a wide variety of non-proprietary products including traditional assets such as stocks, bonds and mutual funds, as well as a wide variety of alternative assets. Alternative investments include real estate investments, hedge funds, futures, limited partnerships, limited liability companies, private stocks, promissory notes, offshore funds, mortgages and precious metals.

Health Savings Accounts

Millennium Trust has taken a unique approach to our Health Savings Account program developing HSA solutions for advisors and financial institutions. Our HSA combines the efficiencies of a high-deductible health plan with banking and a wide range of investments. And, our solution for advisors (fee-only or traditional brokers) enables advisors to manage the investments in the HSA allowing them to maintain control of the client relationship while expanding their current expertise and investment offering. Millennium's HSA focus and expertise puts financial institutions and advisors at the front of the converging health and wealth market providing their clients with long-term solutions into retirement.

Advisor Services

Whether assets are qualified or taxable, actively traded or held long-term, traditional or alternative, Millennium Trust provides advisors with exceptional cost-effective and client-oriented service. And while we do not manage assets, we support for developing asset management strategies such as equity basket trading and exchange traded funds. Millennium Trust consistently delivers accurate and timely account details and performance reporting that supplements the advisor's relationship with their clients.

Company Facts

- Privately-owned Trust Company located in Oak Brook, IL
- Rapidly growing custodian specializing in Alternative Assets
- Over 60,000 client accounts
- $2.5 billion of assets under custody
- Expanded FDIC coverage to $1 million in unaffiliated banks
- Oversight by the Illinois Department of Financial & Professional Regulation

Automatic Rollover Solution

Our Automatic Rollover solution fully complies with the Safe Harbor regulations of Section 657(c) of the Economic Growth and Tax Relief Reconciliation Act of 2001. We are uniquely positioned to work with record keepers, TPAs and plan sponsors to service a large volume of IRA accounts. Plan Sponsors are able to outsource terminated participant accounts to us as an IRA provider and save money, time and valuable personnel resources, and at the same time, preserve tax deferred retirement savings for their former employees.

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TheSmartAlternative