

Alternative Investments In Self-Directed IRAs and Solo 401(k)s

Our self-directed IRAs give you control and flexibility to manage your own diversified portfolio of both traditional and alternative assets.

Most investors consider flexibility an important requirement when deciding how and where to invest their retirement assets.

Due at least in part to stock market volatility, more investors are including alternative investments in their retirement strategy. Millennium Trust's extensive expertise in the custody of these non-traditional assets allows you the widest choice in the type of investments for your self-directed IRA or Solo 401(k).

Investment Procedures

There are specific documents associated with investing in any of the alternative investments available at Millennium Trust. Any investment direction or other forms necessary for your IRA or Solo 401(k) account are easily accessible on our website, mtrustcompany.com.

In addition, our knowledgeable, experienced associates can assist you with the various steps and forms required for each type of alternative investment.

Your Ally for Alternatives

With a Millennium Trust IRA or Solo 401(k), all of an account's assets—traditional or alternative—can be handled in one place, by one custodian. Once established, an investor will receive a consolidated statement for all asset types and will experience exceptional client service. Having the account's alternative assets with a single custodian saves valuable time and avoids frustration.

Diversify Beyond Traditional Assets

We custody both traditional and alternative assets within retirement plans that are frequently not accepted by most other custodians. In addition to traditional assets such as stocks, bonds, and mutual funds, we also custody:



REAL ESTATE/REAL ASSETS



HEDGE FUNDS



COMMODITIES/FUTURES



MARKETPLACE LOANS



GOLD/PRECIOUS METALS



PRIVATE EQUITY/DEBT

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We are your ally in supporting a diversified multi-asset portfolio. We provide access to, and custody solutions for, alternative investments so you can take advantage of new and emerging opportunities with confidence.

Service

For sophisticated investors, we believe support is essential to provide a fluid experience. Millennium Trust is always available — by phone or email — to answer your questions or support your needs.

We are completely independent and unbiased, and while we don't provide investment advice, we prioritize the custody of your assets, regulatory transparency and your satisfaction as a client.

Access

As a custody provider, we provide you with access to a wide range of choices.

Custody for alternative investments and retirement and taxable accounts through our website.

Access to a wide spectrum of investment options for qualified investors through our Millennium Alternative Investment Network® (MAIN®).

More options mean more opportunity to diversify your portfolio.

Expertise

Established in 2000, Millennium Trust is an expert provider of specialty custody solutions that make access to alternative assets possible. Our custody expertise gives you the peace of mind that the details are taken care of. Whether it's hedge funds, or real estate, traditional investments, or a range of other investments, Millennium Trust has the know-how to provide the right custody solutions for you.

ABOUT MILLENNIUM TRUST



Privately-owned trust company headquartered in Chicago area



Specializing in custody and retirement services



Over 1.2 million client accounts

More than \$26.6 billion assets under custody

Regulated by the State of Illinois

Established in 2000, Millennium Trust is an expert provider of custody solutions committed to the evolving needs of advisors, financial institutions, businesses, and individual investors. Millennium Trust empowers clients with trusted expertise, exceptional service and access to a wide range of custody solutions. Whether you are managing alternative assets, investment accounts or retirement funds, we are uniquely qualified to service your custody needs.

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For more information, visit us at mtrustcompany.com or call us at 866.388.9419

Millennium Trust Company performs the duties of a directed custodian, and as such does not provide due diligence to third parties on prospective investments, platforms, sponsors or service providers and does not sell investments or provide investment, legal, or tax advice.
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