CUSTODY SERVICES

Futures Trading IRA

Tax-Advantaged Investing in Futures, Forex and Commodities

Further diversify your retirement holdings in a wide range of asset types with a Millennium Trust IRA.

Tax-Advantaged Futures Investing

Individual Retirement Accounts (IRAs) offer investors options to further diversify their retirement holdings by allowing investments in a wide range of asset types. Investors can use IRAs to trade futures, forex and commodities in a standard brokerage account, while benefiting from the various tax-advantages available through the following retirement account types:

- Traditional IRA
- Roth IRA
- SEP IRA
- Simple IRA
- Solo 401(k)

Qualified IRA Custody

In order to maintain an IRA's tax-advantaged status while trading futures, all funds must flow through a qualified IRA custodian. The custodian's role is to open the IRA, move money in/out of the trading account held by the IRA and provide all required tax reporting.

Funding Options for Investors

IRAs can be funded in severals ways:

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

Easy Account Setup

Millennium Trust establishes the IRA and initiates the transfer or rollover of assets from the transferring custodian. Once the IRA is funded, the cash balance is automatically transferred to the trading account and available for investment. The client or their designated futures industry professional can then begin trading the account.

SUBMIT ALL ACCOUNT OPENING DOCUMENTS

IRA AND TRADING ACCOUNT OPENED

IRA AND TRADING ACCOUNT FUNDED

Contact Us Today

Millennium Trust Company has extensive experience providing expert IRA custody for futures trading accounts.

Contact our dedicated Futures Client Service team to find out how they successfully work with investors and futures industry professionals to establish an IRA and futures trading account, and to help ensure that both are properly funded and maintained for tax-advantaged futures trading.

Futures Client Service

800.932.0053
fcmsupport@mtrustcompany.com
mtrustcompany.com

Futures Trading IRA

We are your ally in providing effective, independent custody of alternative assets so you can offer more investment options to your clients.

Service

At Millennium Trust, we pride ourselves on constantly seeking ways to improve and extend our custody services. We are here to support you so that the custody process is seamless. From the onboarding process through to reporting, we are never more than a call away. Think of us both behind the scenes and by your side, opening up new opportunities and supporting you every step of the way.

Access

With the Millennium Alternative Investment Network®, we provide you with a direct, efficient way to research and access new alternative investment opportunities for your clients. From private equity and real estate deals to marketplace lending and more, we provide access to a wide range of options, all supported by our custody services. Of course, we also custody current holdings with the assurance of clear, transparent access, as well as seamless processing and reporting.

Expertise

Millennium Trust is an expert provider of specialized custody solutions. Our particular expertise in the complexities of alternative assets and deep understanding of the regulatory environment make us an ideal choice for advisors seeking to offer more than just traditional investments to their clients.

Independence

We are completely independent and unbiased, with no affiliation with any investments or advisory services. Unlike other custodians, there is never a fear of competitive conflict. We are truly dedicated to you and to empowering you with more options for your clients. From alternatives to rollover IRAs, and everything in-between, we'll find the custody solution that best works for you.

ABOUT MILLENNIUM TRUST

Privately-owned trust company headquartered in Chicago area

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Specializing in custody and retirement services

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Over 1.2 million client accounts

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More than $26.6 billion assets under custody

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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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ABOVE AND BEYOND CUSTODY®

MILLENNIUM TRUST COMPANY®