Experience Simplicity and Increase Access with the Millennium Trust API Solution

API integration with the Millennium Trust API Solution helps support a seamless and transparent digital experience between your client interface and Millennium Trust's custody solutions, enabling you to increase transaction volumes, reduce processing times and control the user experience.

What is the Millennium Trust API Solution?

Application Programming Interface (API) is a technology that allows applications to communicate with one another. Integration with Millennium Trust's API solution offers sponsor platforms and advisor systems the ability to facilitate investment in their products through a Millennium Trust retirement account.

Millennium Trust's API Solution provides a seamless and transparent digital interface between your platform and system with Millennium Trust's custody solutions, enabling you to increase transaction volumes and access to the multi-trillion dollar IRA market. You'll have full visibility and control of the client experience, while greatly reducing processing times through a fully digital interaction.

The Millennium Trust API Solution offers various funding options, including ACH contributions and cash ACAT transfers.

Portals & Activity Dashboards

In addition to our integration capabilities, we offer several emerging portals and activity dashboards that provide a secure, online experience, making it easy to work with Millennium Trust. A few benefits of the portals and activity dashboards include:

- Improved security
- Expedited operational processes
- Transactional reporting
- Position and cash balances
- Templates for frequent requests

Benefits

Controlled Experience

Engage with clients your way. Trusted partners can connect with Millennium Trust's custody and retirement solutions through multiple methods of integration, maintaining the client experience within their own enterprise.

Improved Efficiency

Through automated, streamlined integration, administrative processes can be simplified to dramatically decrease the amount of time and manual effort required for completion—resulting in an increase in accuracy, security and productivity.

Transparent Access

Institutional trusted partners can provide online status updates and full transparency into investment and account process flows.

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

Custody Services

At Millennium Trust, we are committed to helping individual investors and the financial institutions that support them with best-in-class solutions.

Features

Adaptability
Integrate Millennium's services with your technologies, while building a consistent and customizable end-user experience.

Experience
Access a dedicated team of experts to ensure a seamless implementation and integrated API solution.

Open Communication
Leverage Millennium Trust's API Solution to allow direct communication between users , which provides complete, accurate data and an improved client experience.

Trusted Expertise

With 20 years of trusted expertise, we are insightful and constantly adapting to the evolving financial and regulatory environment. We bring smart solutions, collaboration and years of experience to every interaction.

Access

We offer clients access to a wide range of unique solutions, tools and resources needed to accomplish their business and investment goals.

Exceptional Service

Millennium Trust prides itself on exceptional client service — with the sole focus of delivering a high level of service of regardless of account size. Our clients are served through intuitive digital experiences and/or high-touch client service teams.

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 2.2 million client accounts

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More than $33.5 billion assets under custody

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Regulated by the State of Illinois

For more than 20 years, Millennium Trust Company has been a trusted provider of specialized retirement and institutional custody services. We began by focusing on building unique solutions where no one else would or could. As our industry has evolved and the competitive landscape has changed, Millennium Trust has grown, too.

Today, we're known for our ability to help employers, advisors and institutions solve complex business problems – while ensuring individual investors are empowered with tools and resources to be successful on their retirement journey.

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API 152
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ABOVE AND BEYOND CUSTODY®

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