

How to Get Started Integration Engagement Plan

Your clients want a seamless experience. Whether they are opening and/or linking an account, purchasing an investment, or initiating funding, the process should be quick and easy. Millennium Trust's open integration allows you to build your user experience. With an effort to make this a seamless experience for you as well, our engagement plan may help set some expectations.



DISCOVERY

- Discuss integration options and capabilities
- Establish goals for integration
- Review integration information



ASSESSMENT

- Assess integration compatibility
- Obtain and review security practice questionnaire responses
- Production environment created upon completion of assessment



RELATIONSHIP

- Complete and sign agreement
- Review asset(s); add to Millennium Trust platform
- Begin onboarding



INTEGRATE

- Deliver production environment
- Develop and test user experience
- Review and approve
- Go Live!



SUPPORT

- Ongoing service
- Enhancement notifications

ABOUT MILLENNIUM TRUST

Privately-owned trust company
headquartered in Chicago area

Specializing in custody and
retirement services

Over 1.4 million client accounts

Over \$26.7 billion assets under custody

Regulated by the State of Illinois

Established in 2000, Millennium Trust Company is a trusted leader in specialized retirement and custody services, empowering clients with unmatched service, access to a wide range of custody solutions and expertise they can count on. Whether it's the custody of alternative assets, investment accounts or retirement funds, Millennium Trust is uniquely qualified to support our clients' success.

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Learn more at mtrustcompany.com/integration or call us at 800.258.7878

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