

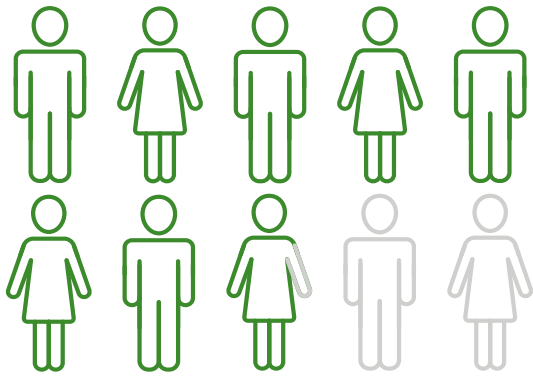
SEEKING NEW WAYS TO DIVERSIFY

It can be important for investors to diversify beyond traditional assets to get the most out of their retirement portfolio. Alternative assets offer options for additional diversification, but a survey showed few high-net-worth (HNW) investors have matched their rate of ownership to their interest in alternative assets.*

Traditional assets dominate portfolios.

78%

of HNW investors surveyed report holding mutual funds.



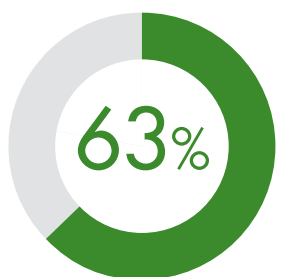
67%

of HNW investors surveyed report holding individual domestic stocks.



Millennium Trust's proprietary research of HNW investors shows that investor ownership of alternative assets lags despite strong interest.

REAL ESTATE



of HNW investors are moderately or extremely interested in investing in real estate.

37%

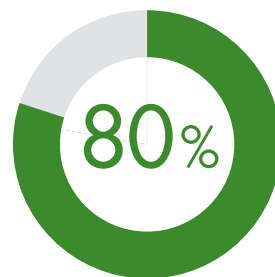
of HNW investors surveyed own investment real estate (exclusive of personal residences).

10%

hold investment real estate in an IRA or SEP-IRA.

Talk to a Millennium Trust expert to learn more about holding real estate in an IRA.

HEDGE FUNDS



of HNW investors reported at least some interest in investing in hedge funds. **14%** were extremely interested.

15%

of HNW investors surveyed hold hedge funds.

8%

hold hedge funds in an IRA or SEP-IRA.

It's a simple process to hold hedge funds in a retirement account at Millennium Trust by **opening a self-directed IRA**, which offers flexible investment options.

Helping investors find a solution.

Investors and their advisors should discuss how adding alternatives to qualified accounts could help to achieve their retirement goals.

ABOVE AND BEYOND CUSTODYSM

Learn more about using your retirement account to invest in alternatives at mtrustcompany.com

*Based on an April 2017 survey by Millennium Trust Company of 500 individuals ages 30 and up with household income of \$200,000+ who have invested in stocks, bonds or commodities through an IRA or SEP-IRA.

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.