RETIREMENT SERVICES

Top 5 Reasons

To Select Millennium Trust as Your IRA Provider

Millennium Trust offers service you can count on, a seamless process for you and your plan participants, and experts taking care of the details at each step.

Do what you do best, and put us to work on the rest.

1. Independent and Secure

Millennium Trust is an independent custodian. In our view, the objective is simple: focus on the client. We do not compete for your client's business. We administer over 1 million accounts with total assets under custody exceeding $25 billion.

2. Expertise

We have been providing automatic rollover solutions to plan sponsors, TPAs and record keepers since 2005. Millennium Trust offers a flexible solution that can accommodate all rollovers including active, terminating and abandoned plans. Close to 100,000 plan sponsors use our Automatic Rollover Solution.

3. Service and Support

A dedicated relationship manager will guide you through the process and provide you with a solution designed for your organization. We can save you time, money and reduce fiduciary risk, while preserving participants' retirement account savings.

Participants have access to our client service team via phone, e-mail, fax or in person. Each team member is experienced with IRAs and well-trained on IRS distribution rules. Our client service team utilizes a dedicated trust accounting system that keeps track of the underlying investments, transactions and tax reporting.

Each IRA owner receives a Welcome Kit and is offered web access to account information and annual statements. We provide tax reporting, including Form 5498.

4. Easy and Complete Access

Our services are comprehensive, and are uniquely equipped to accommodate any number of small accounts. Rollovers are invested initially in an FDIC insured money market vehicle and participants have a full range of investment options and tools. When addresses are out-of-date, we use search tools to find missing participants.

Security and confidentiality are critical. Millennium Trust offers the highest level of data integrity, and securely interfaces with all retirement record keeping systems. We gather participant information via password protected e-mail, secure portal or through 128-bit encrypted file format.

5. Reasonable Fees

Millennium Trust is committed to providing our Automatic Rollover Solution at no cost to plan sponsors and TPAs. Our fees are charged to the participant and are very reasonable.

ABOUT MILLENNIUM TRUST

- Privately-owned trust company headquartered in Chicago area
- Specializing in retirement and custody services
- Over 1.2 million client accounts
- More than $26.6 billion assets under custody
- Implemented by over 95,000 retirement plans
- Regulated by the State of Illinois

Established in 2000, Millennium Trust is an expert provider of retirement and 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.

2001 Spring Road, Suite 700
Oak Brook, IL 60523

For more information, visit us at mtrustcompany.com or call us at 630.368.5614

RS 109
01/19

ABOVE AND BEYOND CUSTODY®

MILLENNIUM TRUST COMPANY®