

Automatic Rollover News

Providing Safe Harbor IRA Solutions

WELCOME TO THE SPRING EDITION OF AUTOMATIC ROLLOVER NEWS!

FIND UNCLAIMED RETIREMENT FUNDS AT MILLENNIUM TRUST

Millennium Trust is dedicated to helping individuals to reconnect with their forgotten and unclaimed retirement assets.

According to Terry Dunne, Managing Director of the Rollover Solutions Group at Millennium, "Department of Labor statistics reveal that at the end of 2013, about 16 million people still had retirement assets in a former employer's retirement plan. A significant percentage of these assets may represent missing, non-responsive participant assets."

"It's in everyone's best interest—both plan sponsors and employees—to ensure that no retirement funds go unclaimed," added Mr. Dunne. "We are pleased to provide this resource and encourage anyone who has lost track of a retirement account at a former employer, to come to our site and search for unclaimed funds."

To research your accounts or for more information, visit: www.mtrustcompany.com/unclaimed-retirement-funds

2016 401(K) SUMMIT: A WAKE-UP CALL

On April 8, 2016, the DOL published its final Fiduciary Rule in the Federal Register. In an interview published in 401(k) Specialist Magazine, called 2016 401(K) Summit: Millennium Trust Like What It Sees, Terry Dunne, offers his first impressions of the new rule to editor John Sullivan.

"DOL did what they said they were going to do," he says, echoing fiduciary proponent Blaine Aikin from days earlier. "They received comments, softened up the language and created a situation where it will likely help American families. It will cause advisors to put clients first. Kind of like mission accomplished."

While not everyone (unsurprisingly) is as enthusiastic as Dunne, he feels it's "a spark for the next steps for consumers to pay attention" to important retirement issues.

To read the full interview, [click here](#).



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CONFERENCE SCHEDULE

[Mid-Sized Retirement & Healthcare Conference](#)
May 1 - 4
Grande Lakes, FL

[NIPA Annual Forum & Expo](#)
May 1 - 4
Las Vegas, NV

[PSCA Annual Conference](#)
May 3 - 4
Nashville, TN

[LIMRA Retirement Industry Conference](#)
May 4 - 6
Boston, MA

[Southwest Benefits Annual Conference](#)
May 4 - 6
San Antonio, TX

ANNUAL SEARCH FOR MISSING PARTICIPANTS

Reuniting participants with their retirement assets is a top priority at Millennium Trust. We have a comprehensive search procedure in place to help locate missing participants when their accounts first arrive at Millennium, and we also search for each missing account holder on an annual basis.

In situations where we are provided an incorrect address, we utilize a multi-step investigative process. Successive searches of various databases are employed, including the NCOA database, LexisNexis® and, if necessary, by Risk Compliance Performance Solutions LLC (RCP). For more information on participant searches, [click here](#).

INSTITUTIONAL RELATIONSHIP MANAGERS PROVIDE HIGH TOUCH SUPPORT

Millennium's Rollover Solutions Group focuses on providing best-in-class service for all of our clients including TPAs, recordkeepers, consultants, employee benefits attorneys, accountants, and plan sponsors.

To that end, we have added two Senior Relationship Managers to the team, dedicated to servicing our large plan sponsors: [Carolyn Musinski](#) and [Cari Stables](#).

They join [Karin Stouffer](#), Senior Relationship Manager servicing recordkeeping relationships and large plan sponsors and Nancy Ramirez, Relationship Manager servicing TPAs, consultants, accountants and employee benefit attorneys. Carolyn and Cari bring significant experience to Millennium's institutional efforts particularly in client service management. Combined, both Carolyn and Cari have over 35 years of experience in the financial services industry.

Help us welcome Carolyn and Cari. Contact your Relationship Manager today to say hello and discuss how we can provide an easy, fast, and flexible solution for you. In addition, please let us know what we can do to enhance your experience or improve our services.

Midwest Business Group on Health
36th Annual Conference
May 5 - 6
Chicago, IL

ASPPA Philadelphia Regional
Conference
May 19 - 20
Philadelphia, PA

California Bankruptcy Forum - 28th
Annual Insolvency
May 20 - 22
Indian Wells, CA

IHC Forum & Expo
May 24 - 26
Atlanta, GA



LEARN MORE

To learn more about how Millennium Trust's Automatic Rollover Solution can benefit you, contact:

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