

Automatic Rollover News

Providing Safe Harbor IRA Solutions

WELCOME TO THE WINTER EDITION OF AUTOMATIC ROLLOVER NEWS!

MILLENNIUM METRICS: A NOTE FROM OUR MANAGING DIRECTOR

When launching our Automatic Rollover Solution in 2005, we knew that to grow and become a leader in the industry we would need to deliver innovative and best-in-class service. That means continually improving technology and adjusting staffing levels to stay ahead. It also means maintaining a constant focus on the needs of both plan sponsors and individual clients.

I think the results of our approach speak for themselves. We've grown a lot.

We now work with **over 31,000 plans** and **over 1,000 recordkeepers, TPAs, consultants, and attorneys**. And we're rapidly closing in on opening our **700,000th individual account, since 2005**.

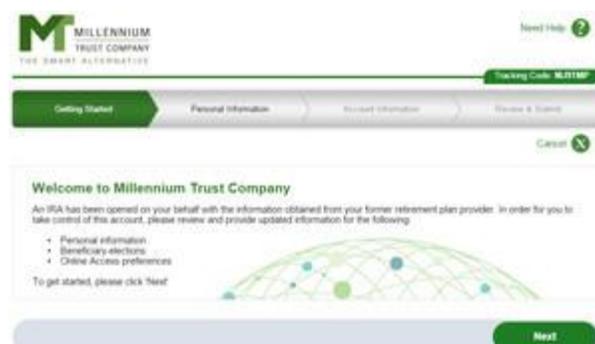
We've made continual improvements to our technology across the board. From making it easier for plan sponsors to access and e-sign service agreements and securely transfer participant information, to launching an online version of our adoption agreement for individual clients.

We've also added staff. Senior Relationship Managers who help with onboarding and deliver personalized attention to plan sponsors and our institutional relationships. **In 2015 alone, they onboarded over 5,000 new plans who opened over 155,000 new rollover accounts**. And we now have 30 well-trained client service representatives who are 100% dedicated to assisting those individual participants with questions about our service. **For 2015, they provided assistance for approximately 160,000 callers in over 21 different languages**.

Thank you for a spectacular 2015! We're looking forward to continuing to provide you with quality services and the peace-of-mind that comes from knowing your former participants are well taken care of.

ONLINE ADOPTION AGREEMENT LAUNCHED!

Millennium Trust is excited to report the launch of the RSG Online Account Agreement.



This new online form is user friendly and will replace the paper version of the Automatic Rollover Adoption Agreement currently sent to account holders in the Automatic Rollover client welcome kit. This new tool creates operating efficiencies, reduces costs and makes it easier for clients to reunite with their retirement assets.



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IN THIS ISSUE

[Millennium Metrics: A Note from Our Managing Director](#)

[Online Adoption Agreement Launched!](#)

[Millennium has the Account Holder Covered](#)

[Exploring the Road Ahead for the DOL's Proposed Fiduciary Rule](#)



CONFERENCE SCHEDULE

[SunGard Advanced Pension Conference](#)

February 10 - 12
Orlando, FL

[P&I Defined Contribution Conference - East](#)

March 6 - 8
Miami, FL

[ASPPA Business Managers and Owners Conference \(BMOC\)](#)

March 20 - 22
Rosemont, IL

[Mid-Sized Retirement & Healthcare Conference - West](#)

March 20 - 22
San Francisco, CA

To make it easier for account holders to take control of their account, find answers to FAQs and to start using Millennium's online tools, you can direct former employees to visit the [Rollover IRA account holder page](#) on our redesigned website.

MILLENNIUM TRUST HAS THE ACCOUNT HOLDER COVERED!

The New Year means different things to everyone – for some it's a time to decompress from holiday festivities and for others it may be filled with excitement as a time for new beginnings and to fulfill New Year's resolutions. For Millennium, it's a time to reenergize and rededicate ourselves to servicing our clients!

To best service account holders, Millennium offers online agreement and distribution processing, a redesigned website offering an expanded Frequently Asked Questions section and, if calling by phone, we've added staff and increased client service hours. Clients may now access our client service group daily from 8:00 am to 8:00 pm weekdays and 8:00 am to 12:00 pm on Saturdays and we continue to offer client service support in multiple languages. Read more about how [Millennium takes care of its clients](#).

EXPLORING THE ROAD AHEAD FOR THE DOL'S PROPOSED FIDUCIARY RULE

As the U.S. braces for an inevitable retirement crisis, financial professionals who are best prepared for the coming changes are likely to win the race for leadership in the retirement market.

Exploring the Road Ahead for the DOL's Proposed Fiduciary Rule

Regardless of how the DOL's final rules take shape, the entire conversation around conflicts of interest is healthy for the financial services industry and investors, providing transparency and insight into the retirement advice marketplace.

Terry Dunne

Nov 9, 2015

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This bylined article by our own Terry Dunne, Managing Director of Rollover Solutions at Millennium Trust, was recently released in [Wealthmanagement.com](#). In the article, Terry explains that companies who combine retirement education and retirement income products will be ahead of the curve. The whole discussion about conflicts of interest provides transparency and insight into the retirement advice marketplace.

Read the full article, [Exploring the Road Ahead for the DOL's Proposed Fiduciary Rule](#).

HR Exec. Health/Benefits Leadership Conference

March 30 - April 1
Las Vegas, NV

NABT Spring Seminar

April 7 - 10
Atlanta, GA

NCEO - Employee Ownership Conference

April 12 - 14
Minneapolis, MN

NAPA/ASPPA 401(k) Summit

April 17 - 19
Nashville, TN

Tri- State Healthcare Human Resources Spring Conference

April 20 - 22
Myrtle Beach, SC



LEARN MORE

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