

Retirement Services News

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Free up your time for more summer fun.

While automatic rollovers are the cornerstone of our business, we offer a robust suite of services to help you save time, reduce costs and liabilities, and better serve plan participants.

[Learn More](#)



OTHER WAYS WE CAN HELP:

- Search efforts for missing participants with balances > \$5000
- Uncashed Checks
- Payroll Deducted IRAs
- Check Distribution/
Tax Reporting Services
- Notification Services

Millennium Trust's Terry Dunne featured in *401k Specialist*

Learn how plan sponsors establish practices and procedures to help plans run smoothly and remain in compliance.

Terry is a regular contributor to this publication and many others.

[Read the article >](#)



Terry Dunne, Managing Director
[Follow Terry on LinkedIn >](#)



Kathy B.
Senior Client Service Specialist
Retirement Services

Behind the scenes and by your side.

We pride ourselves on exceptional client service. Meet Kathy B., one of our Senior Client Service specialists. We asked Kathy how she goes Above and Beyond to serve our clients:

"When engaging with our clients, I keep in mind that each individual has a unique situation and that compassion will go a long way even if it is the smallest act of kindness. At the end of the day, you have to feel good about what you do and that integrity will speak for itself."



Hear Terry Dunne speak at this year's ASPPA Annual Conference.

Mention "Millennium Trust" to receive discounted registration!

Terry will host a breakfast session on Monday, October 23. We are also a proud exhibitor at this year's conference.

OCTOBER 22-25, 2017
NATIONAL HARBOR, MD

[Register Now](#)

[View all of our upcoming conferences >](#)



Gaylord National Resort

National Harbor, MD

STAY CONNECTED



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