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# Retirement Services News

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## The Past, the Present, and the Future

Automatic rollovers started as a little-noticed component of legislation, but have since become a best practice for plan sponsors and providers. The future will bring a variety of regulatory and industry trends that will drive demand for automatic rollover IRAs. Download our latest whitepaper to learn more.

[Download Whitepaper](#)

The whitepaper cover features a black and white photograph of a lighthouse situated on a rocky island. A winding stone path leads up to the lighthouse. The sky is overcast, and the ocean is visible in the background.

### Automatic Rollover IRAs: From Legislative Footnote to Fiduciary Best Practice

RETIREMENT SERVICES

Since being introduced in 2001, Automatic Rollover IRAs have gone from legislative footnote to best practice for plan sponsors and providers. Based on recent developments, they are poised to remain a central part of plan administration for the next 10 years and beyond.

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## Be Prepared for the Modernization of Form 5500

In his recent *Journal of Pension Benefits* article, our Managing Director, Terry Dunne, discusses how plan sponsors should prepare for the proposed modernization of Form 5500.



[Read Article >](#)

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## Small Accounts Are Not a Small Matter

Terry Dunne hosted a session at the [Mid-Sized Retirement & Healthcare Conference](#) on Monday, May 7th in New Orleans, LA. During his presentation, he discussed how missing participants and uncashed checks are getting the attention of Washington and the DOL. Plans sponsors need to change the process of locating missing participants or use solutions like automatic rollovers.

[More about this topic >](#)

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## An ally you can count on

We pride ourselves on exceptional service, so we've built our support team to go above and beyond the average client service reps. One of the largest resources we offer to our clients is our relationship managers. These individuals are committed to cultivating and maintaining positive relationships with our existing clients to ensure high levels of focused satisfaction. Trustworthy, educated and service-oriented are just a few qualities that are mentioned when our clients are asked what kind of people work at Millennium Trust.



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