Retirement Services News

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Empowering Small Businesses to Save for Retirement

It is expected that many Americans will not have enough savings to adequately fund their retirement, leading the country towards a potential crisis. Millennium Trust has developed **Workplace Savings Solutions** to provide small and mid-sized businesses and their employees' access to easy and affordable retirement plans.

Learn More

Interested in learning more about Workplace IRAs?

Read our article, "Why The Time is Right For Workplace IRAs"

Roll over your accounts before year end

With a month left in the year, now is the time to roll over your missing and non-responsive plan participants to save money and reduce fiduciary risks.

I'm ready to rollover accounts >

Account Security Update

The security and confidentiality of our clients is always a priority for us at Millennium Trust. We have implemented additional steps to help protect our clients' information. To learn more, visit our security and privacy policy pages.

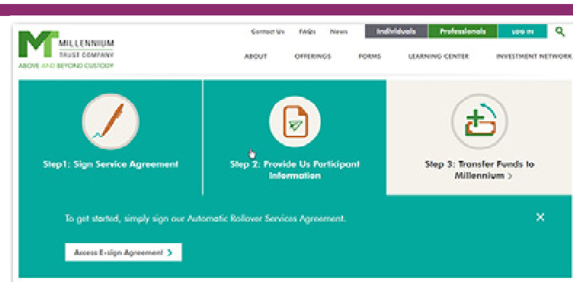
Rich U.
Senior Client Service Specialist
Retirement Services

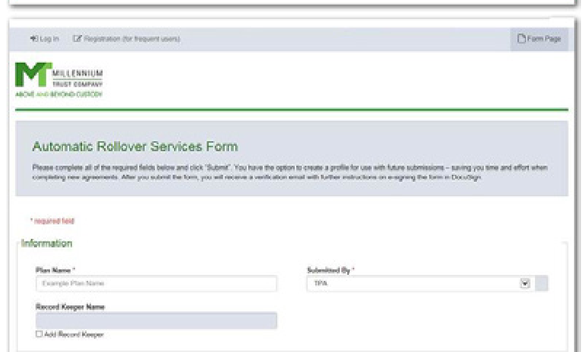
Behind the scenes and by your side.

We pride ourselves on exceptional client service. Meet Rich U., one of our Senior Client Service Specialists. We asked Rich how he goes Above and Beyond to serve our clients:

"Client service is not just a job. In order to go Above and Beyond for our clients, it has to be a passion. I pay attention to what they are saying, how they are feeling and what I can do to help them. That personal ownership and connection leaves a client feeling better than when they first called. That is Above and Beyond Service. That is Millennium Trust Company."

Our E-signature Process





[Millennium's Automatic Rollover E-signature] process provides an inherent level of security. Whether you need to sign one Service Agreement or many, it is always a streamlined process.

Plan Sponsors and their referral sources, such as TPAs and advisors, can sign up as a recurring user by entering their firm name and information only once. The fully executed document goes to all parties including Millennium, the plan sponsor and the referring party.

ABOVE AND BEYOND CUSTODY℠

Millennium Trust performs the duties of a custodian and, as such, does not provide any investment advice, nor any tax or legal advice.

Our address is 2001 Spring Road, Suite 700, Oak Brook, IL 60523