



MILLENNIUM TRUST COMPANY • 820 JORIE BOULEVARD, SUITE 420 • OAK BROOK, IL 60523
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Q Describe your firm, its offerings and its mission.

Millennium Trust is a leader in providing administrative and custodial services for a wide range of Alternative Assets held in taxable and retirement accounts including IRAs, Solo 401(k)s and health savings accounts. Millennium delivers customized and integrated service solutions to large financial institutions, Registered Investment Advisors, Investment Sponsors and the clients they serve. Millennium Trust also acts as a qualified custodian for RIAs as required by Custody Rule 206(4)-2 under the Investment Advisers Act of 1940.

Q Describe your investment strategy and how it might be unique.

Millennium Trust solely performs the duties of a directed custodian and does not provide investment advice or sell investments, nor does it offer any tax or legal advice.

Q How has your firm adapted during the recent economic downturn?

Millennium has experienced significant growth over the past two years as more and more investors seek to add alternative assets to their retirement investing strategies.

AT A GLANCE

Firm name: Millennium Trust Company

Principals: T. Scott McCartan, CEO;
Gary Anetsberger, COO

Employees: 165

Location: Oak Brook, IL

Years in business: 11

Assets under management: \$3.6 B assets under custody

Minimum investment: None