inspira

Empowering Investors & Institutions with Streamlined Custom Portals

Company Overview

Millennium Trust Company provides retirement and institutional custody services to help employers, advisors, and institutions solve complex challenges.

The Challenge

Despite using Salesforce as their CRM, their outdated B2B portals and reliance on manual processes left both their team and clients burdened with inefficiencies. The Millennium Trust team enlisted LaunchPad Lab to streamline the customer experience and automate internal processes.

The Approach

The LaunchPad Lab team quickly moved into an intensive discovery phase, interviewing key stakeholders who managed and used the portal. With a clear understanding of user's needs, plans for two distinct portals emerged one focused on retirement services and another prioritizing asset management.

Pain Points

- X Admin inefficiency
- X Time-consuming processes
- X Manual data entry for admins
- X Poor UX for clients

Product Requirements

- ✓ Modern tech stack (Heroku)
- ✓ Elevated mobile-friendly UX/UI
- 🗸 Data compliance
- ✓ Salesforce integration



🕼 LaunchPad Lab

Building Distinct Portals for Two Critical Lines of Business

The Solution

The Retirement Services Platform (RSP) helps large institutions that partner with Millennium Trust manage retirement accounts after individuals leave their companies (i.e., automatic rollover IRAs).

- Recordkeeping, TPAs, and plan sponsor users can easily view the status of their automatic rollover submissions and agreements.
- Automated email notifications have improved transparency between Millennium Trust and its clients.
- Users can easily process automatic rollovers, increasing operational efficiency.

The Asset Custody Platform (ACP) provides institutional and individual investor clients with curated user flows for managing communication and routing documents.

- Sponsors can easily add new assets and upload relevant data which is then routed through the custody review process.
- Once approved, investors can confirm the asset purchase data, including dollar amounts, percentages, and shares on the platform.
- If an asset is being liquidated, the liquidation flow walks the user through it seamlessly.
- An investor can shift funds from one asset to another, by simply submitting information through the ACP.

um Trust Instructions and

The Results

The portal's bespoke user flows and automation has greatly improved the overall process for all users.

- Streamlined operations
- Finhanced user experience
- ✓ Optimized workflows
- ✓ Automated processes
- ✓ Seamless Salesforce integration

\$6M

Successfully Funded in Rollover Accounts in 6 Months

75%

Improved Operational Efficiency

PIPLAN	spira	,	Welcome, Jackie Barnett				
ĥ	Home	Assets	Search Assets		Add New Asset	Ţ Filter	Tasks (11) View all
							Purchase Transaction
E.	Assets	Status 🛈	Accepted Date	Name	Investors	Total Value	04/07/2022 12:06PM Funds were sent to your bank for Ascension
pira Confirm Pend Contact U	Js	Accepted	03/31/2022	Really long security legal name		\$1,000.34	Lending Trust Londring PM 4/19/201 on [cm/, dd/yyy]. Hear services a service of the transition and complete the Millennium Trust confirmation process. Pandina Llauidation 05/3/2022 tox804M Linguidae Conferencia (RAT, Michael Linguidae Conferencia (RAT, Michael Linguidae Conferencia (RAT, Michael Linguidae Conferencia (RAT, Michael
inload Documents	uments						
nfirm Purchase		Accepted	03/31/2022	Security legal name		\$1,000.34	
Download Documents —	acts	8 Cancelled	03/31/2022	Really long	-	\$1,000.34	
Below you'll find the documents for the ourchase(s) you chose to confirm. Download				security legal name			was requested on 3/31/2022. Please Proceed to the task to complete the Millenium Trust
he Millenium Trust documents and each lient's documents, then save them for your ecords. Keep in mind, funding was already	ioon	R Awaiting Response	03/31/2022	Really long security legal name		\$1,000.34	
ent for each transaction.	tors						Transactions (30) View all
After you download your documents, take note of the following:		Accepted	03/31/2022	Really long security legal name	,	\$1,000.34	OurCrowd (Investment In Wave) LP
 It's important to review the investor registration, wire instructions and contact information. That information is critical for 		⊘ Accepted	03/31/2022	Really long security legal name		\$1,000.34	05/02/2022 12:06PM Purchase
processing and our ability to custody the							OurCrowd (Investment In Wave) LP
asset. You must register the investment(s) to:		Awaiting Response	03/31/2022	Really long security legal name	-	\$1,000.34	04/02/2022 12:06PM Purchase
Millennium Trust Co. LLC Custodian {Client name_Account type_last 5 digits of MTC account number} 2001 Spring Road. Suite 700 Oak Brook. IL 60923-5122	**	⊗ Cancelled	03/31/2022	Really long security legal name		\$1,000.34	OurCrowd (Investment In Wave) LP 04/02/2022 12:06PM Purchase
You can find the investor Tax ID on the W-9 Form. Millennium Trust's tax ID should be used for all investments in retirement							

