MILLENNIUM
TRUST COMPANY

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Despite using Salesforce as their CRM, their outdated B2B portals and reliance on manual processes left both their team and clients burdened with inefficiencies.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

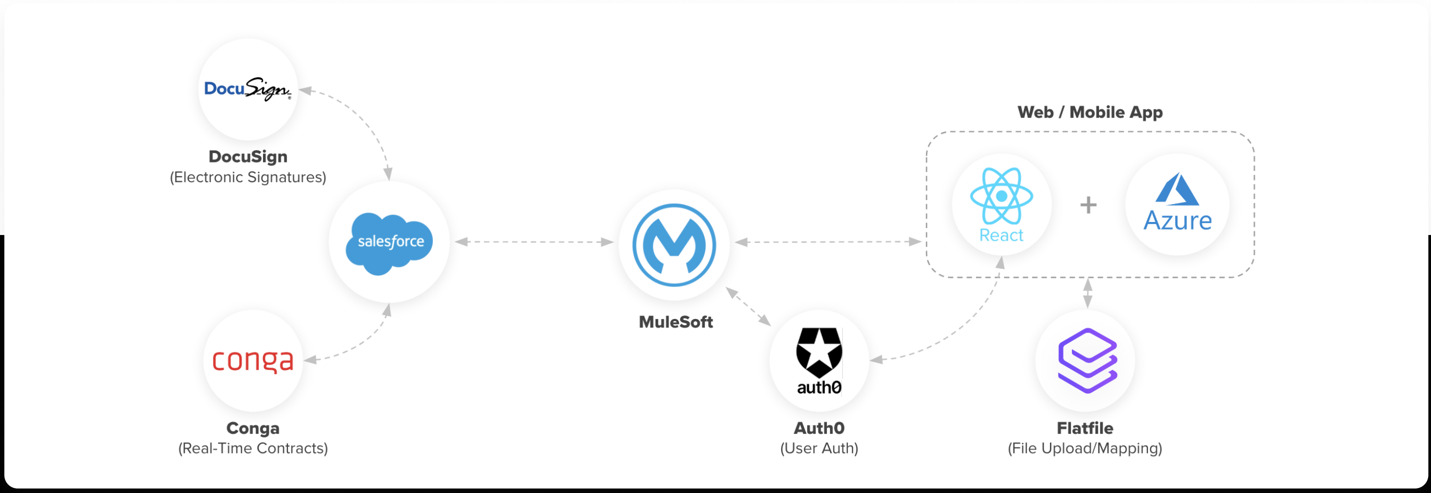
The LaunchPad Lab team quickly moved into an intensive discovery phase, interviewing key stakeholders who managed and used the portal. With a clear understanding of user's needs, plans for two distinct portals emerged one focused on retirement services and another prioritizing asset management.

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/Ionic)
- ✓ 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.

The Results

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

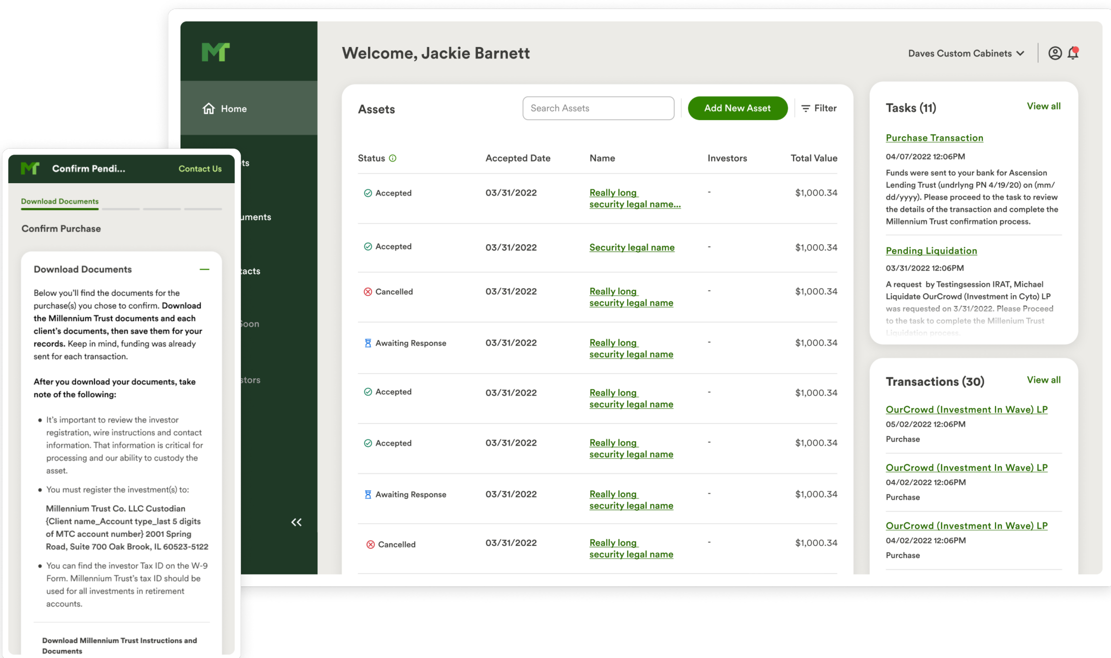
- ✓ **Streamlined operations**
- ✓ **Enhanced user experience**
- ✓ **Optimized workflows**
- ✓ **Automated processes**
- ✓ **Seamless Salesforce integration**

$6M

Successfully Funded in Rollover Accounts in 6 Months

75%

Improved Operational Efficiency



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Read our full case study here!