

Testimonials

I have been writing and managing qualified plans for 19 years now and over all those years I have worked with a lot of different TPA's. I would highly recommend working with Millennium Pension Services, Inc. We could not be happier with our choice to take them on as our Third Party Administration Company.

Philip L. Beh, PB Financial & Insurance Services

For the past five years, Millennium Pension Services, Inc. has provided excellent service for our company. We appreciate their responsiveness, accuracy and attention to our account.

Adrienne Bolger, Foothill HomeCare Partners, Inc.

We are a CPA, financial services and payroll firm. As the trusted advisor to our clients, we team up with Millennium to provide the TPA services for our clients. We have been working with Tara Brown and her team for about 7 years. Millennium has been a great resource for us - No matter what time of the day it is we can always get a hold of them and get our questions answered.

Scott Brown, CPA/PFS, CFP

I can highly recommend Millennium Pension Services for their professionalism and expertise. Millennium handled all aspect of plan creation and annual filings in a timely and correct manner which resulted in a favorable IRS determination when the plan was eventually terminated on the sale of our company. Millennium are true experts in pension planning.

Simon Harrison, President, Dynaroll Corp

Millennium Pension Services responsiveness to my demands has allowed me to facilitate timely planning strategies that exceed expectations. They have provided excellent service to my clients by being attentive to the details.

Ken Kathcart, CPA Partner

Testimonials

I think we have finally found a service that we can feel confidence in handling such an important matter as a retirement plan. Tara Brown and the crew at Millennium are reliable, trustworthy and efficient...a difficult combination to come by in today's business world. I guess the saying is true..."good things come to those who wait"...Millennium was definitely worth the wait.

Sheila M. Miller, T.M.C. Enterprises

Millennium seamlessly keeps our profit sharing plan in compliance with the ever-changing legal requirements. Any time I have a question, I get a prompt, understandable answer. I would highly recommend their services.

Richard B. Pumilia, Pumilia Patel & Adamec LLP

I have worked with Millennium Pension Services (MPS) over the last 5 years. Tara Brown has an outstanding understanding of all aspects of retirement plan servicing and has been a valuable partner to Retirement Revolution in developing new business opportunities. I look forward to continuing to work with MPS and Tara to win more plans, and build a mutually rewarding relationship

Donna Ross, President, Retirement Revolution

Millennium Pension Services provides administrative services free of any investment bias. Thanks for your valued service and continued ethical approach to my client's retirement plan.

David Wade, AIF, APM, CLU, ChFC, CIMC Consultant

Tara is thorough, knowledgeable and passionate about her work. It's a pleasure doing business with her.

Bonnie Yam, Principal, CFA, EA

I want to thank you so much for the extraordinary effort and tremendous work performed by you and your staff.

Michael Zorzi, CFO, Cunico

Complete testimonials on website



Collaborating with Professionals for Retirement Success

Highlights

- We can handle all aspects of administration on all types of tax-qualified retirement plans including 403(b) plans and Welfare Benefit Plans
- We believe in personal service
- We do not sell investment products
- We offer the best possible services to our clients
- Our policy has always been to offset any fees that we charge for services by any compensation that we receive from the service provider

**52 W. Sierra Madre Blvd.
Sierra Madre, CA 91024**

Phone: (888) 355-3039

Fax: (626) 355-3713

Email: tara@mpssm.com

Website: www.mpssm.com

Our Services

A Team Approach for Qualified Retirement Plans

Collaborating with Professionals for Retirement Success

Why Choose Millennium?

Millennium designs the best plan for the Plan Sponsor's objectives and retirement goals. We work closely with Plan Sponsors, Attorneys, Brokers, CPAs, Financial Advisors, RIAs, investment companies and other interested parties. Furthermore, our senior staff at Millennium – being familiar with many different firms and their methods – provides a greater deal of technical expertise than other small administration firms. We are here as a resource for you.

Types of Plans

- 401(k) Plans
- 403(b) Plans
- Cash Balance Plans
- DB/DC Combo PPA Plans
- DB/DC Floor Offset
- Defined Benefit Pension Plans
- New Comparability/Tiered Plans
- Profit Sharing Plans
- Safe Harbor 401(k) Plans
- Welfare Benefit & Cafeteria Plans
- Nonqualified Deferred Compensation Plans
- Creative Plan Design

Types of Entities

- C or S Corporations
- Partnerships
- Sole Proprietors
- LLCs or LLPs
- Non-Profit Organizations

FINANCIAL ADVISOR

- Possible responsibilities:
- Investment guidance
 - Placement
 - Participant education
 - Monitoring and review
 - 404(c) compliance
 - QDIA

ATTORNEY

- Plan documents
- Legal advice
- Estate planning

Millennium Pension Services

- Documents
- Plan design/re-design
- Personal/quality services
- Actuarial services
- Benefit calculations
- Compliance
- Regulatory Reporting
- Form 5500 and Attachments
- Terminations/ Loans/ Hardship
- 408(b)(2) disclosure
- Secure File Exchange



CPA

- Possible Objectives:
- Maximize/generate deduction
 - Short turnaround time for projections/proposals
 - TPA available for questions
 - Asset protection

PLAN SPONSOR

- Possible Objectives:
- Maximize contributions for owners/HCEs
 - Maximize tax deductions
 - Provide retirement income/security
 - Recruit and retain key employees
 - Motivate and reward employees

SERVICE PROVIDER/ RECORDKEEPING PLATFORM

- Possible Functions:
- Recordkeeping expertise
 - Investment selection and monitoring
 - Investment Policy Statement
 - Participant-level recordkeeping
 - Power of compounding interest
 - Electronic transfer of data
 - Employee enrollment and communication tools including QDIA
 - 1099R

Any Recordkeeping fees Millennium may receive from the investment company will offset plan expenses

QUALIFIED RETIREMENT PLANS

