

### The Challenge

Millennium Trust Company's Automatic Rollover Program spent significant staff time printing, mail merging and assembling welcome kits. Their process did not allow them to take advantage of postal discounts, used office printers for variable print items, required manual tracking of inventory on static copy and were unable to produce and deliver the kits within a reasonable timeframe.

### The Solution

With NPN360's help, a bound welcome kit booklet was developed that allowed for variable printing through a cover window. The kit also included a pre-populated perforated reply form that clients could complete and return in an enclosed reply envelope. The envelopes, covers and kit components are now mass produced and stored by NPN360. Twice each week, Millennium Trust provides client data via a secure portal and welcome kits are fulfilled and mailed within 48 hours.

### The Results

With the new process implemented with NPN360, Millennium Trust is now able to fulfill welcome kits quickly without the hours of staff time previously required, regardless of the volume of welcome kits needed at any given time. They are also able to use the NCOA process to update their client files and minimize wasted postage on undeliverable mail. Mass printing of the static elements reduced the print costs and automation relieves the stress of assembling kits manually.



### Quick Look:

Millennium Trust Company  
Oak Brook, Illinois

Millennium Trust is a fast-growing financial services firm that offers proven administrative and custodial services to individual investors, financial institutions, investment advisors, plan sponsors and employers. The company has more than 170,000 accounts with total assets under custody exceeding \$4.6 billion.

*“NPN360 analyzed our most challenging printed business communications issue — our Automatic IRA Rollover Kits and provided a state-of-the-art, online solution. We now have a fully automated, professional solution that gets them out correctly, quickly and economically. The quality and timeliness of the entire process has helped us grow this important area of our business and improved our service to clients.”*

Terrence W. Dunne,  
Managing Director

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