



# Minor's Trust Account Web Guide

## Trust Highlights

The Minor's Trust was established in 2002 to advance the personal health, education, and welfare of Community member children. To meet our obligation to protect and preserve the interests of minors, the Salt River Pima-Maricopa Indian Community establishes a Trust account for each child in our Community. Each quarter, SRP-MIC makes a cash contribution on behalf of each child.

While your child is a minor (under age 18), contributions are paid into a Trust account rather than directly to the child. The money in the account is invested and held for your child until age 18. The Community Council serves as the Trustee to all minors, including making decisions about how the contributions are invested.

Money may be taken from the Trust account at these times:

- **Before the minor reaches age 18** – There are four types of special payments a parent or guardian may take on behalf of a minor, including approved expenses for health, clothing, education, and income tax. To request a special payment, complete the Certification of Need and Use form.
- **Ages 18-20** – Upon reaching age 18, the young adult may be eligible to begin receiving direct yearly young adult payments from their Trust account. Young adults must request these payments themselves by submitting an Adult Payment Form.
- **Upon reaching age 21** – Your child may be paid all of the money in their Trust account.

## Your Secure Website

Your account on the Milliman website is **100% secure and confidential** – verified by the check mark at the bottom right of the Welcome screen. No one can access your account information without your login ID and password. After you have finished an online session, always close out by clicking the “Log Off” button (in the upper right screen).



## What You'll Find

Information about your Trust account is accessible through MillimanBenefits.com, where you will find:

- Announcements about upcoming events
- Quarterly statements and other financial information about the account
- Payment request forms
- Helpful brochures – such as *How to Read A Minor's Trust Statement*
- *Minor Times* quarterly newsletters – with financial updates and calendar of events.

This guide explains how to access information about your online Trust account.



# How to Log On

1. Go to <https://www.millimanbenefits.com/>.
2. Enter the login ID. Here's how to identify the login ID. Login IDs are nine digits long – a string of zeros, a 2, and the minor's tribal ID number.

For example, if the tribal ID number is 12345, the login ID would be 000212345. If the tribal ID number is 1234, the login ID would have an additional zero, or 000021234.

3. Enter your password. For your first visit, the password is set to the minor's birth month and birth year (four digits total).

For example, if the minor was born in January 1999, the initial password would be 0199. If the minor was born in November 2000, the initial password would be 1100. You will be asked to change your password to ensure the security of your account.

4. Click the Login button (not Plan Sponsor Login).

# Touring the Website

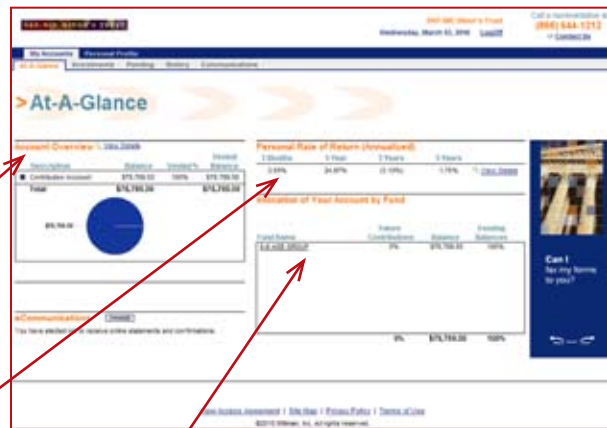
The first three times you log on, **Announcements** automatically pop up, letting you know the schedule of upcoming classes and educational events. Across the top of every page, you'll find the navigation bar. Click on the tabs to visit a different page of information.

## At-A-Glance

Under **My Accounts**, the **At-A-Glance** screen provides an overview of the account's key features.

**Account Overview** shows the total balance (the amount of money in the account).

**Personal Rate of Return** is the rate the investment earns – this percentage refers to the increase or decrease in value of the investments in a given time period.

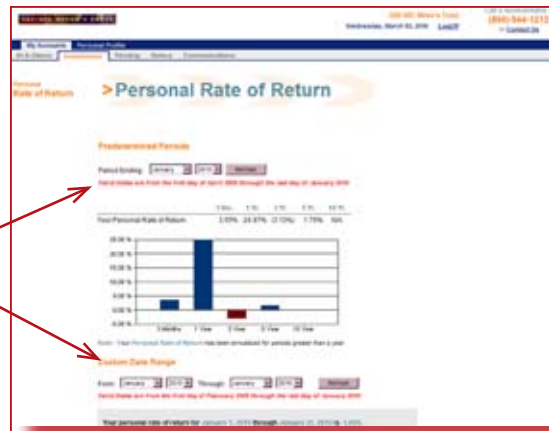


**Allocation of Your Account by Fund** shows the fund in which the money is invested (determined by the minor's age).

## Investments

This tool lets you customize the time period for the rate of return.

Enter a **Custom Date Range** to view the rate of return for a specific time period, which is then displayed in the graph.



## Pending

Payment requests are handled by Providence First Trust Company, and therefore are not reflected on this site. To get information about pending transactions, call Providence First at 602-952-2300 or 800-350-0208.

## History

This page allows you to view the account's history of contributions (which are per capita payments for the minor) and to access previous quarterly statements.

**View Statements** lists copies of statements mailed to your home each quarter, which you can download or print.

Enter a time period, then click on **Contribution Received** for the list of contributions made to the account during that period.

The **Gain/Loss** line shows how much the account has increased or decreased (depending on investment gains or losses).



## Communications

Here's where to find important Minor's Trust documents and forms.

Click **View Announcements** to find the calendar of upcoming classes and educational events.

**View Plan Documents and Forms** is where you'll find printable copies of:

- General documents, such as *How to Read a Minor's Statement*
- Forms, including the Assumption Agreement, Certification of Need and Use, and Adult Payment Form
- Newsletters



## Need Website Help?

If you have any trouble logging on to or navigating the website, call a Milliman representative at 866-644-1212, Monday - Friday, 7:30 am - 5 pm PST. Remember, for your own security, you'll need your initial login ID when you call.

## Personal Profile

This screen lets you review your address on file – but to update it, you must contact the SRP-MIC Enrollment Office at 480-362-7618 or 480-362-7620.

You can **Change Login ID** or **Change Password** by clicking here, on the left sidebar. (If you change your login ID, remember you'll still need your **original** login ID if you call Milliman for web help.)



## Don't Have a Computer?

Computers are available for your use in the office of Salt River Financial Services Institution (SRFSI).

SRFSI is located at:  
8800 E. Chaparral Rd. Suite 240  
Scottsdale, AZ 85256

For questions about and/or to take this action...	Contact...
Payment requests Taxes	Providence First Trust Company 602-952-2300 800-350-0208
Investment returns	Victory Capital Management 866-756-7425
Trust account balance Password reset Quarterly statements	Milliman 866-644-1212 (you'll need your original login ID) <a href="https://www.millimanbenefits.com/">https://www.millimanbenefits.com/</a>
Address changes	SRPMIC Office of Membership Services (in the Community Development Department) 480-362-7618 or 480-362-7620
General financial and investment education	Salt River Financial Services Institution (SRFSI) 480-850-5460 <a href="http://www.srfsi.com">http://www.srfsi.com</a>
General Trust questions	SRPMIC Treasurer's Office 480-362-7494