



Real Estate & IRAs

How to utilize an IRA with RE Investments

**Unlock the
opportunity to
utilize trillions
of dollars held
in IRAs.**

**Make Your
Money Work
for You!**





With a Self-Directed IRA

YOU choose how to utilize your IRA to invest in alternative investments, beyond the stock market.

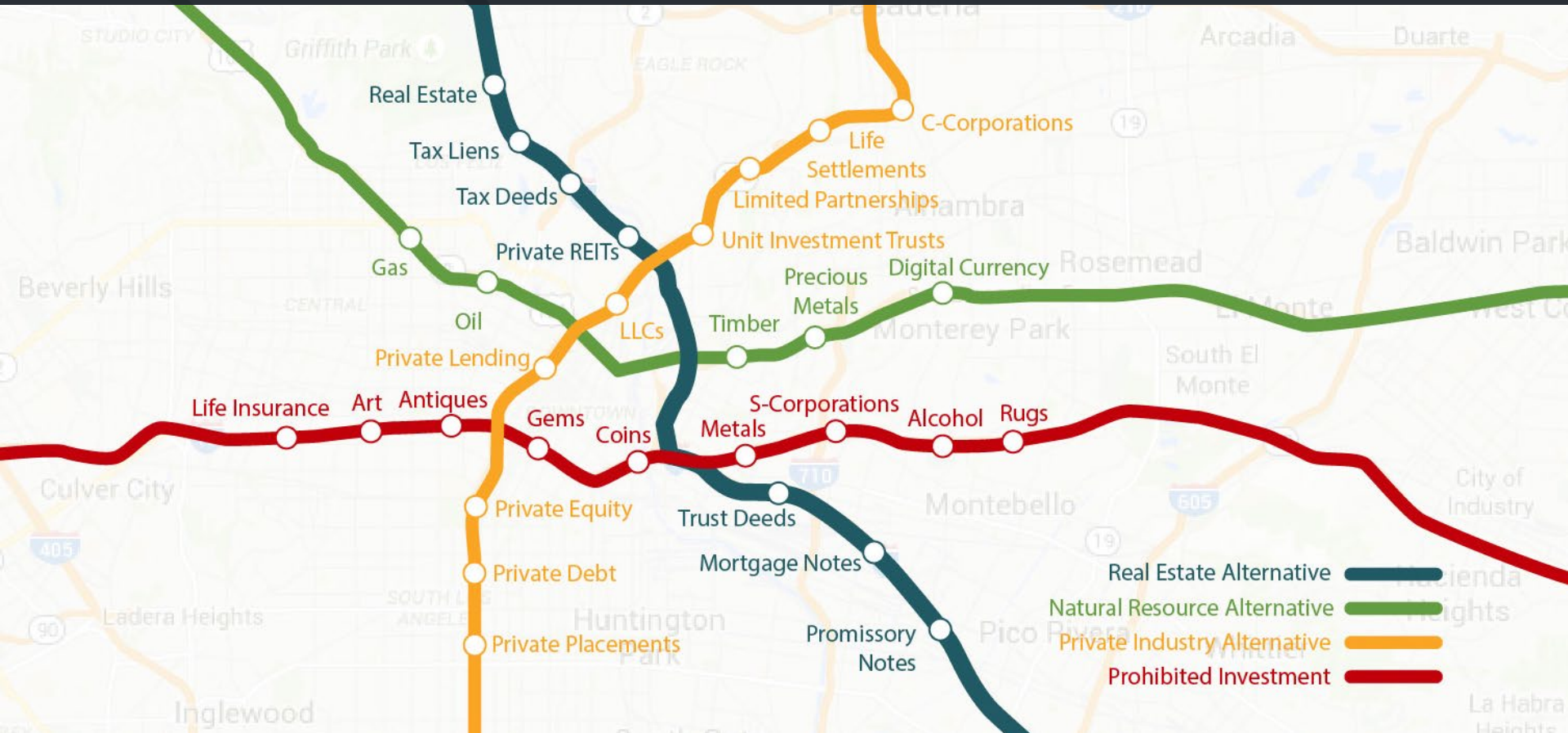
The letters 'IRA' are rendered in a large, bold, blue 3D font with a slight shadow and a reflection below them. The letters are positioned on the right side of the slide, against a white background.

“Big Box” vs Alternative “Self-Directed” Custodian

| | “Big Box” Custodian | Self-Directed Custodian |
|---|-----------------------|-------------------------|
| Fees | No | Yes |
| Alignment with investment. | Yes | No |
| Income from investment retained by Custodian. | Yes | No |
| Alternative investment options. | No | Yes |
| Average return on investment portfolio. | Below market average. | Depends on investment. |

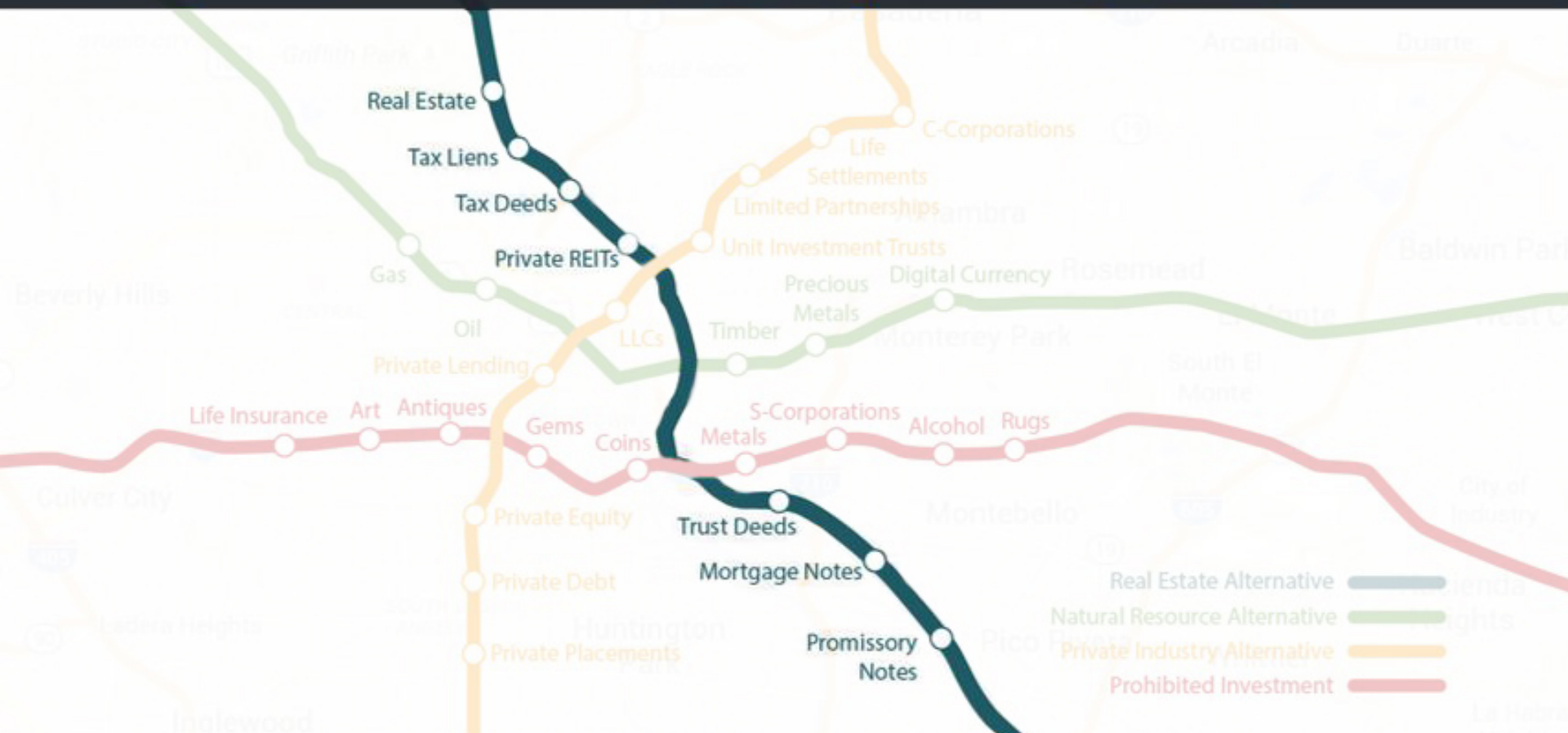


Investment Choices



- Real Estate Alternative
- Natural Resource Alternative
- Private Industry Alternative
- Prohibited Investment

Investment Choices



Benefits of Investing with an Self-Directed IRA

Tax Deferred

Traditional IRA

SEP IRA

Simple IRA

Tax Free

Roth IRA

Benefits of Investing with Preferred Trust Company

High Standard of Compliance

Nevada has one of the most stringent regulatory bodies in the nation

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Fast Processing Times

24 - 48 hrs

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Waived Fees



\$0 Establishment Fee

\$0 First Year Admin Fee

New Accounts
Dec 31, 2021



Retirement plan

| Income Type | Amount |
|-----------------------|--------|
| Monthly Net Income | 4,500 |
| Annual Net Income | 2,500 |
| Annual Monthly Income | 7,000 |

| Details | Additional Income | | Amount |
|-------------------------|-------------------|--|--------|
| | Month | | |
| Mid Year Bonus | June | | |
| Year End Bonus | December | | |
| Total Additional Income | January | | |

| Expense | Costs |
|------------------|-------|
| Monthly Expenses | 2,300 |
| Insurance | 600 |
| Payment | 350 |
| Insurance | 60 |
| | 127 |
| | 120 |
| | 88 |
| | 50 |

| Expenditure | Planned Expenses | |
|-----------------------|------------------|--|
| | Month | |
| November vacation | November | |
| Home for the holidays | December | |
| Gifts for family | December | |
| Family vacation | July | |
| | January | |
| | January | |
| | January | |
| | January | |

What are the necessary steps to set up a Self-Directed IRA real estate transaction?

A smartphone calculator is positioned in the upper left corner of the image. Below it, a financial spreadsheet is visible, featuring the title "Retirement plan" in a large, bold, blue font. The spreadsheet contains various tables and data points related to income and expenses.

Retirement plan

Step One

Complete application process

Step Two

Fund the account

- Transfer/Rollover
- Contribution

Step Three

Identify investment & funding (cash, nonrecourse, etc.)

Step Four

Documentation



Required Documentation

- Contract/Purchase Agreement
- Appraisal or BPO
- Liability Insurance Policy
- Property Management Agreement
- Title Commitment/Insurance
- Draft Deed
- Settlement/Closing Statement
- Wiring Instructions
- Investment Authorization and Direction Form

Benefits of Investing with Preferred Trust Company



On New Account through Dec 31, 2021

Q&A





DISCLAIMER

This presentation is for general information and does not represent tax, legal and/or investment advice. Account usage, selection of investments and the performance of those investments are the sole responsibility of the investor and not Preferred Trust Company. Preferred Trust Company does not perform due diligence on any investment selected by an investor held in their SD-IRA. Therefore Preferred Trust Company strongly recommends that the investor seek professional advice from appropriate legal, accounting and/or tax advisors of their own choosing prior to making investments.



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