PREFERRED TRUST

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

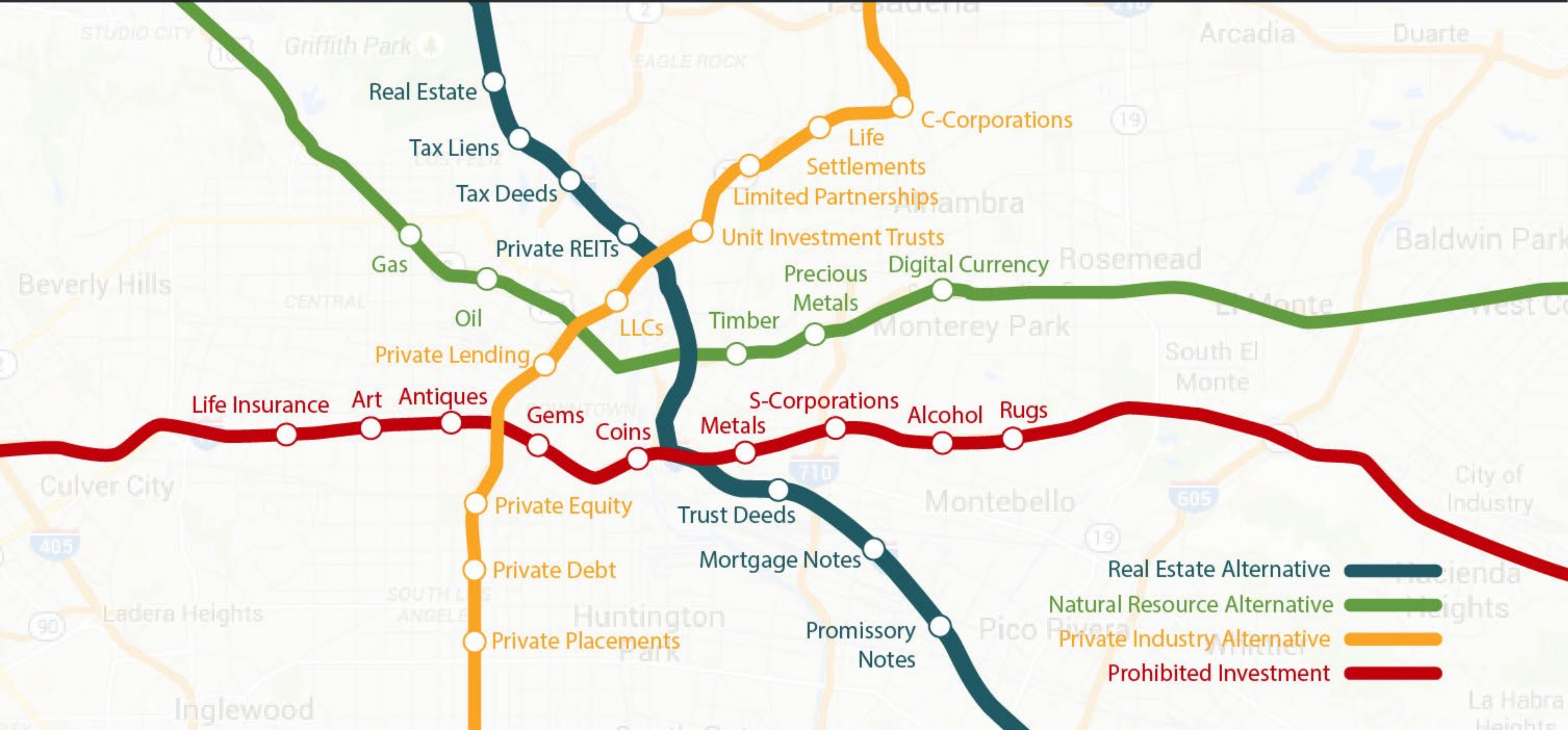
YOU choose how to utilize your IRA to invest in alternative investments, beyond the stock market.

IRA

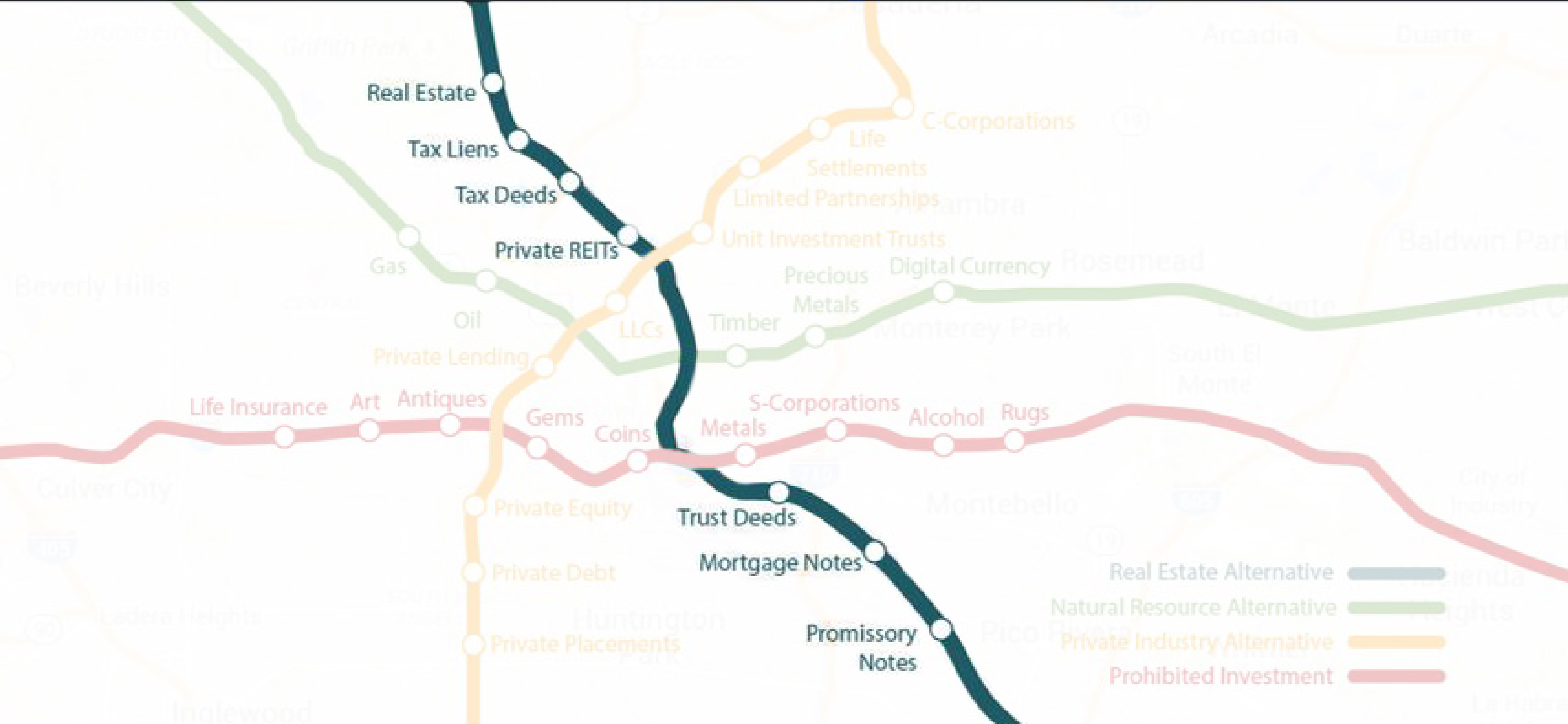
“Big Box” vs Alternative “Self-Directed” Custodian

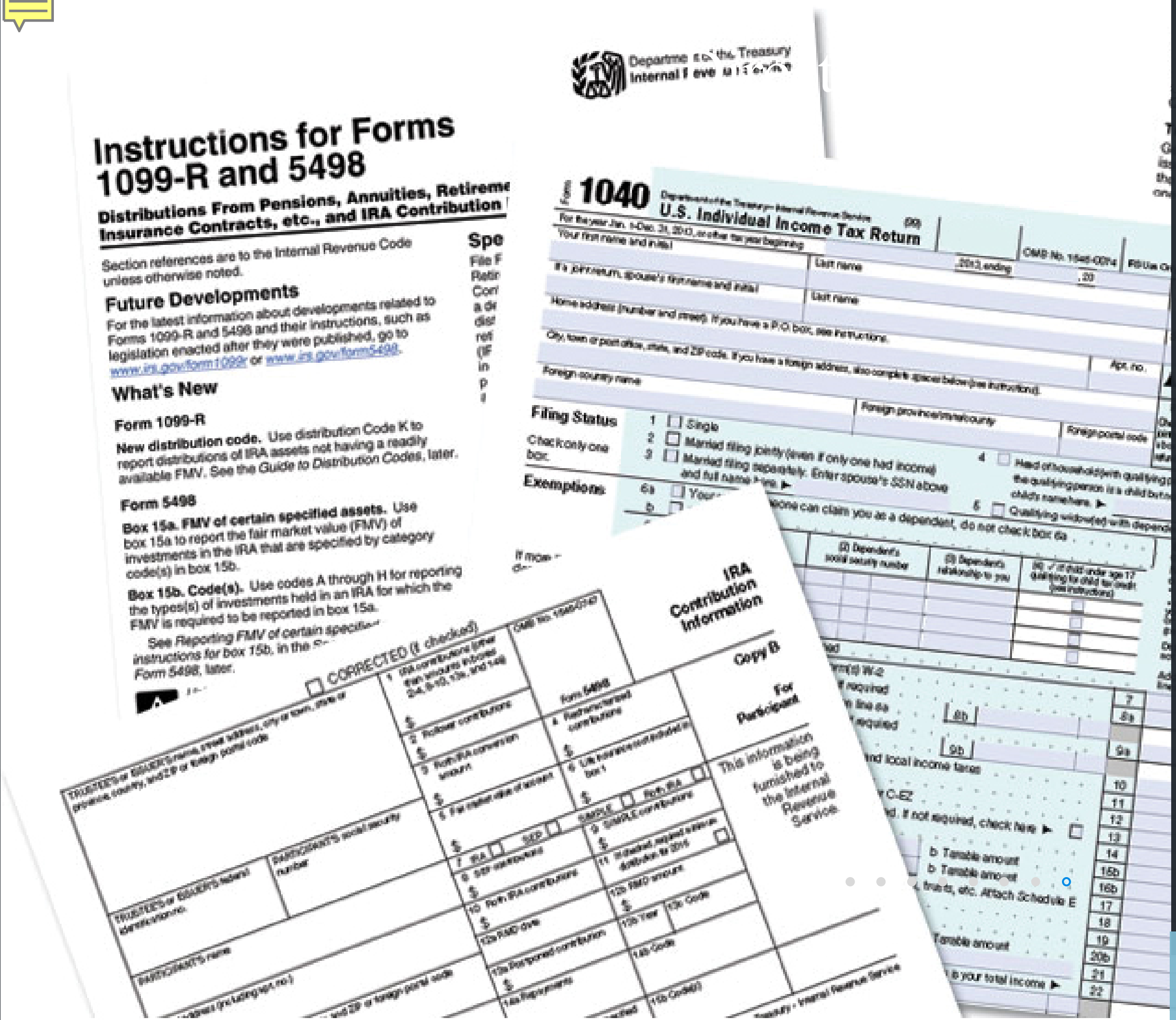
	“Big Box” Custodian	Self-Directed Custodian
Fees	No	Yes
Alignment with investment.	Yes	No
Income from investment retained by Custodian.	Yes	No
Alternative investment options.	No	Yes
Average return on investment portfolio.	Below market average.	Depends on investment.

Investment Choices



Investment Choices





Myth:
Transferring/rolling over qualified funds to an IRA is a taxable event.

Myth:
Investing in real estate through an IRA is a taxable event.

Benefits of Investing with an Self-Directed IRA

Tax Deferred	Tax Free
Traditional IRA	Roth IRA
SEP IRA	
Simple IRA	

Benefits of Investing with Preferred Trust Company

High Standard of Compliance

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

Benefits of Investing with Preferred Trust Company

High Standard of Compliance	Fast Processing Times
Nevada has one of the most stringent regulatory bodies in the nation	24 - 48 hrs

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High Standard of Compliance

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Fast Processing Times

24 - 48 hrs

Waived Fees

$0 Establishment Fee

$0 First Year Admin Fee

New Accounts Dec 31, 2021

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

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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