



# Real Estate & IRAs

How to utilize an IRA with RE Investments

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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.





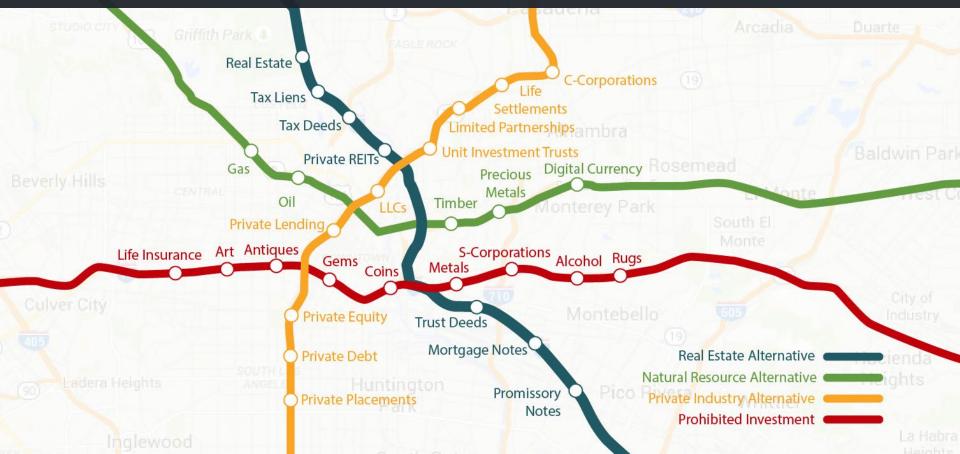
### "Big Box" vs Alternative "Self-Directed" Custodian

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



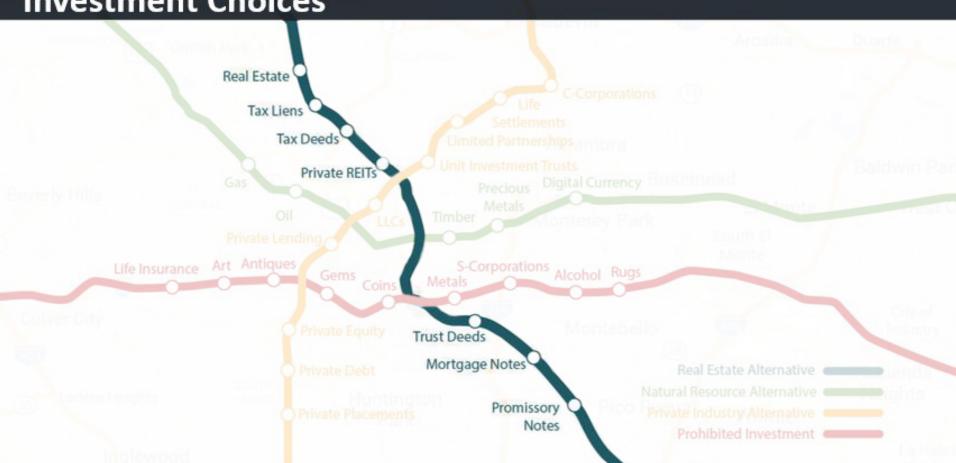


### **Investment Choices**

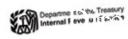




### **Investment Choices**







# Instructions for Forms 1099-R and 5498

Distributions From Pensions, Annuities, Retireme Contracts, etc., and IRA Contribution

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#### 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 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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\$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







#### **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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