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Gold, Digital, and the Government Approved Way to Never Pay Taxes on Your Income.

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.



Why would I want an IRA?

Government gift of tax-deferred contribution and income or tax-free income.



IRA Types and Contribution Levels

Tax Deferred Income

Traditional IRA

Pre-tax income contributed and income generated is tax-deferred.

\$6,000 (\$7,000 if you are 50 or older)

SEP IRA

Simplified Employee Pension for business owners is pre-tax income contributed and income generated is tax-deferred.

Up to 25% of individual compensation with a max of **\$58,000**

SIMPLE IRA

Savings Incentive Match Plan for Employees who contribute pre-tax income and generate tax-deferred income.

\$13,500 (catch-up contributions \$3,000 if you are 50 or older) and don't forget there is 3% employer match on contributions

Tax Free Income

Roth IRA

After-tax income contributed and income is tax-free.

\$6,000 (\$7,000 if you are 50 or older)

Tax Differences

Standard Cash Investment \$3,500 Purchase Price Example

Purchased 20 Bitcoin at \$3,500 per unit
for a total of \$70,000.

Sold 20 Bitcoin at \$55,000 per unit.

Gross Profit: **\$1,030,000**

Capital Gains Tax
(15%): **\$165,000**

Net Income: **\$865,000**

Roth SDIRA Funds \$3,500 Purchase Price Example

Purchased 20 Bitcoin at \$3,500 per unit
for a total of \$70,000.

Sold 20 Bitcoin at \$55,000 per unit.

Gross Profit: **\$1,030,000**

Income Tax: **\$0**

Net Income: **\$1,030,000**



What alternative investments are allowed in an Self-Directed IRA?



Investment Choices





Precious Metals Account Details

What is Preferred Trust Company's involvement in the transaction?

IRA Allowable Metals in a SDIRA | Dealer Selection

All metals are required to meet a pure standard and must be produced by a refiner/manufacturer that is certified/accredited by New York Mercantile Exchange (NYMEX) or Commodity Exchange (COMEX).

- **Gold** - 99.5%
- **Silver** - 99.9%
- **Platinum and Palladium** - 99.95%





Precious Metals Account Details

What is Preferred Trust Company's involvement in the transaction?

Select a Depository

Personal physical possession of your precious metals is prohibited by the IRS. Your precious metals in an SDIRA must be held at a bank or an IRS-approved nonbank trustee.

- Brinks
- Delaware Depository
- Loomis
- Strategic Wealth Preservation (SWP) – Cayman Islands



Precious Metals Account Details

What is Preferred Trust Company's involvement in the transaction?

Compliance – **This is what sets up apart.**

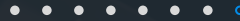
Preferred Trust Company tracks the progress of the precious metals purchase once the SDIRA funds are sent to the dealer.

- Follow up with the dealer.
- Follow up with the depository.
- Follow up with the client.





Precious Metals Dealers integrate into Digital Currency.





Digital Currency Account Details

What is Preferred Trust Company's involvement in the transaction?

Digital Currency is an allowable investment in a SDIRA. How the digital currency is purchased matters. No one wants to lose money.

- Trading Platform - reliability and compliance



Digital Currency Account Details

What is Preferred Trust Company's involvement in the transaction?

Storage of Digital Currency

Digital Currency can be stored in two ways and everyone's level of comfort on this topic is different as to pros and cons.

- **Segregated hardware wallet** (cold wallet)
- Segregated and Non-Segregated web-based wallet (hot wallet)



How do you set up a Self-Directed IRA?





Step One

Complete an SDIRA application online in minutes and identify where the funds are coming from.

- Transfer/Rollover
- Contribution

Step Two

Identify Dealer, Depository and Investment Type

Step Three

Complete an Investment Authorization & Direction Form

Step Four

Funding is completed by Preferred Trust Company

Committed to Excellence

We are a licensed Custodian with a proven track record, competitive fees and happy customers!





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