



Self-Directed IRAs

The Key to Sheltering Your Cryptocurrency Investments from Taxes

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A GIFT FROM THE GOVERNMENT: Why not take advantage of it?

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

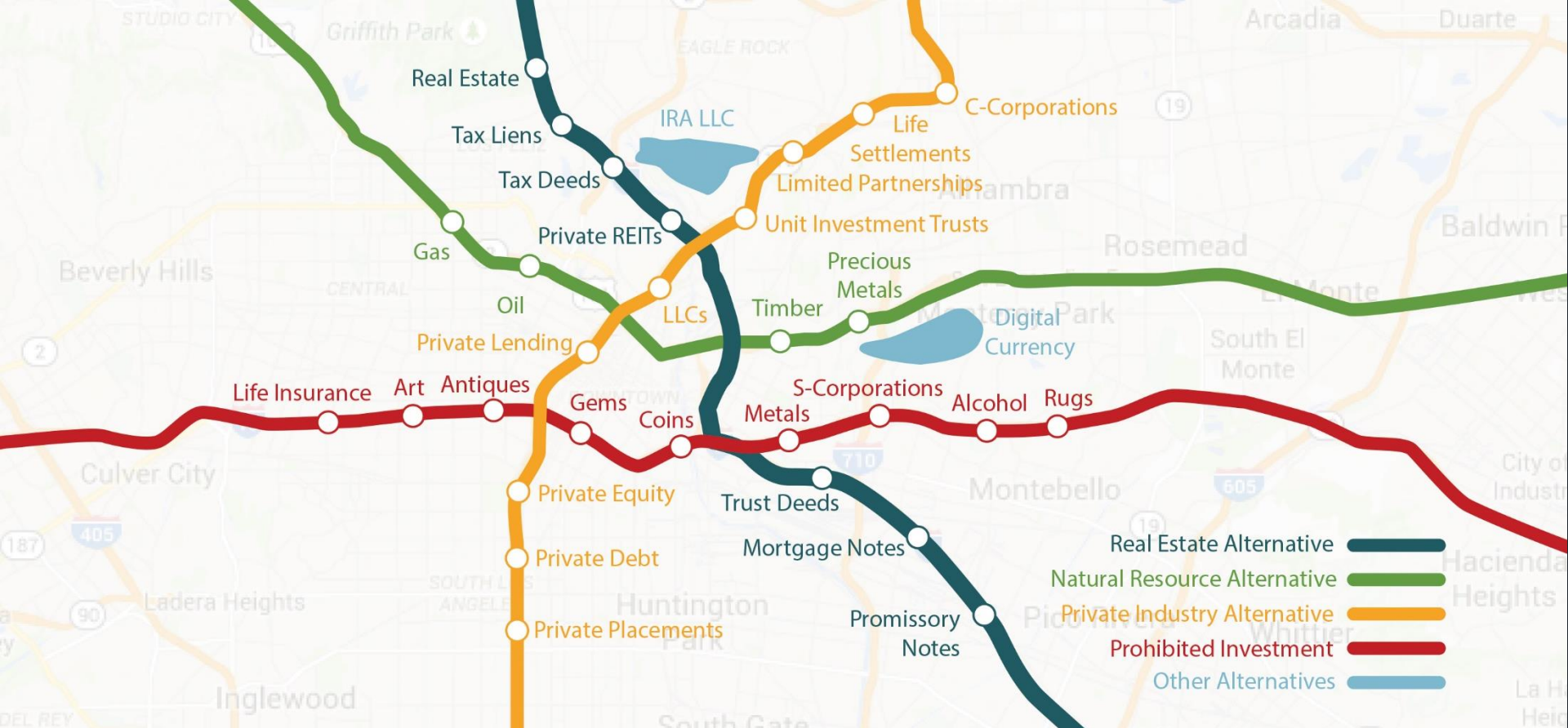
Savings Incentive Match Plan for Employees who contribute pre-tax income and generate tax-deferred income.
\$13,500 (catch-up contributions \$3,000 if you are 50 or older) and don't forget there is 3% employer match on contributions

Tax Free Income

Roth IRA

After-tax income contributed and income is tax-free.
\$6,000 (\$7,000 if you are 50 or older)

ALLOWABLE INVESTMENTS: Self-Directed IRA opens the door.



DIGITAL CURRENCY INVESTMENT STRATEGY: You have a choice.

Preferred Trust Company offers two options:

- Ultimate control through an IRA LLC with checkbook control.
- Purchase digital currency through a broker and have Preferred Trust Company custody the digital currency directly through your IRA.

DIGITAL CURRENCY INVESTMENT STRATEGY: IRA LLC control.

IRA LLC with checkbook control:

- Open an IRA with Preferred Trust Company.
- Establish an IRA LLC.
- Move funds from the IRA to the IRA LLC.
- Buy and sell digital currency on the platform of your choice.
- Store the digital currency in a hot or cold wallet.
- Report Fair Market Value of IRA LLC annually to Preferred Trust Company.
- Enjoy tax-deferred or tax-free increased value of digital currency and future income.

DIGITAL CURRENCY INVESTMENT STRATEGY: IRA LLC control.

Utilizing this option assumes you are knowledgeable and understand the following:

- You are willing to assume the risk of complying with IRS rules and regulations with a qualified plan.
- You have done your due diligence and determined the risks associated with hot and cold wallets.
- You want to be able to complete real-time transactions as the value of digital currency is ever-changing.
- You want to control your fees associated in having digital currency in your IRA.

DIGITAL CURRENCY INVESTMENT STRATEGY: Hands off approach.

Take advantage of the tax benefits of holding digital currency in your IRA without managing it yourself.

- Open an IRA with Preferred Trust Company.
- Identify a broker to purchase digital currency.
- Preferred Trust Company will establish a segregated cold storage wallet.
- Funds are transferred from your IRA to digital currency trading platform.
- Segregated wallet address is provided to you as confirmation that the purchase was completed.
- You can buy additional digital currency or sell upon request.

REGULATIONS MATTER: Buyer beware.



RISK

ADMINISTRATOR
NOT regulated or licensed.

INVESTMENT SPONSOR
NOT a Money Services Business*.

TRADING PLATFORM
NOT regulated by governing agency.

WHO
holds custody of your IRA matters.

WHO
you buy from matters.

WHO
you buy and sell from matters.



MITIGATED RISK

CUSTODIAN
Regulated and licensed.

INVESTMENT SPONSOR
Registered Money Services Business*.

TRADING PLATFORM
Regulated by governing agency.

* A Money Services Business (MSB) is generally any person offering check cashing foreign currency exchange services; or selling money orders, travelers' checks or pre-paid access (formerly stored value) products; for an amount greater than \$1,000 per person, per day, in one or more transactions. A person who engages as business in the transfer of funds is an MSB as a money transmitter, regardless of the amount of money transmission activity. Every MSB must be registered with FinCEN, the regulating body of MSB's.

HIGHEST STANDARDS IN THE SDIRA INDUSTRY: What we say we do.

- We are licensed and regulated by the NVFID, DOL and the IRS as a Custodian.
- We provide superior customer service in our industry.
- We charged reasonable fees for a high quality of service and custody of your SDIRA.
- We are committed to meeting your deadlines.
- We put our money where our mouth is.





RECAP: Digital currency can be sheltered from future tax in an IRA.

1. Digital currency can be held in an IRA under the IRS Code.
2. Digital currency in an IRA can be held in hot and cold wallets.
3. Digital currency in an IRA can be bought and sold by you.
4. Digital currency in an IRA can be custodied by Preferred Trust Company.
5. Digital currency increases in value can be tax-deferred or tax-free in an IRA.
6. Digital currency is an investment and with all investment there are risks.



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