



# REWARD YOUR RETIREMENT

WITH TAX-FREE/TAX-DEFERRED INVESTMENTS



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.



**CARRIE COOK**

CEO  
Preferred Trust Company



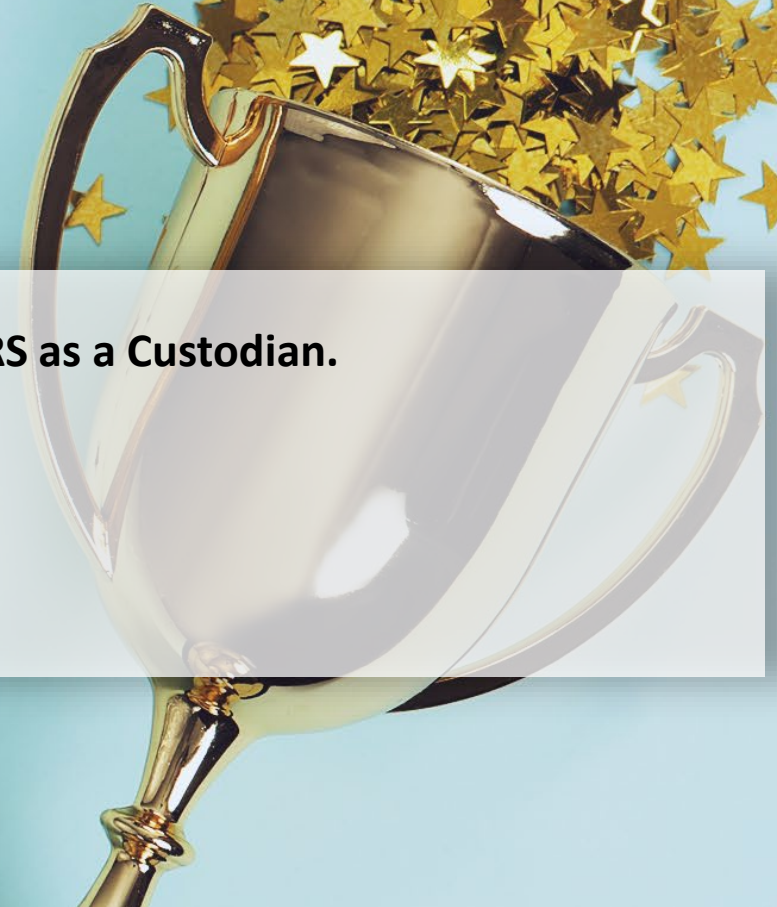
**AMANDA KAY**

Founder  
Passive Income Investors Group



# *Preferred Trust Company Overview*

- ★ **We are licensed and regulated by the NVFID, DOL and the IRS as a Custodian.**
- ★ We provide superior customer service in our industry.
- ★ **We charge reasonable fees for high quality service.**
- ★ We are committed to meeting your investment deadlines.



# A GIFT FROM THE GOVERNMENT

## STEP ONE: What Type of IRA do you have?

TYPE  
1

### Tax Deferred Income

#### Traditional IRA

Pre-tax income contributed and income generated is tax-deferred.  
**\$6,500** (\$7,500 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 **\$66,000**

#### SIMPLE IRA

Savings Incentive Match Plan for Employees who contribute pre-tax income and generate tax-deferred income.  
**\$15,500** (catch-up contributions \$3,000 if you are 50 or older) and don't forget there is 3% employer match on contributions

TYPE  
2

### Tax Free Income

#### Roth IRA

After-tax income contributed and income is tax-free.  
**\$6,500** (\$7,500 if you are 50 or older)

### MAGI

INDIVIDUAL

\$153,000

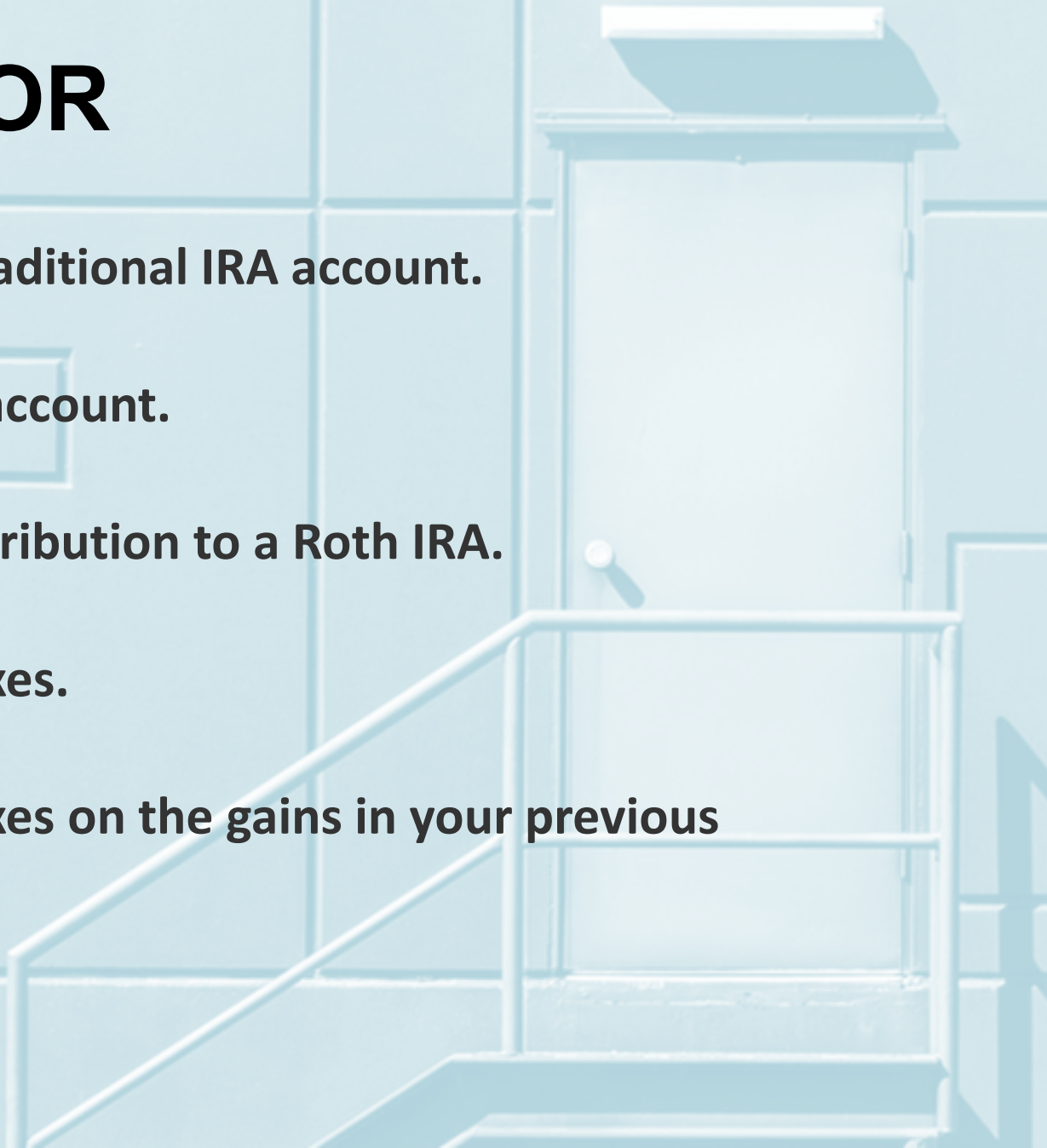
MARRIED

\$228,000



# **BACK DOOR**

- 1. Put money in a Traditional IRA account.**
- 2. Open a Roth IRA account.**
- 3. Convert your contribution to a Roth IRA.**
- 4. Prepare to pay taxes.**
- 5. Prepare to pay taxes on the gains in your previous Traditional IRA.**



# **STEP TWO:** How do you fund your SDIRA?



**Rollover 401K**



**Transfer**



**Contribution**



# STEP THREE: What investment options do I have?

STEP  
1

Determine IRA Type  
**Complete SDIRA**  
**Application Online**

STEP  
2

**Complete**  
**Transfer/Rollover**  
Move Funds from  
Qualified Plan

STEP  
3

Identify Investment  
**Complete**  
**Investment**  
**Authorization**

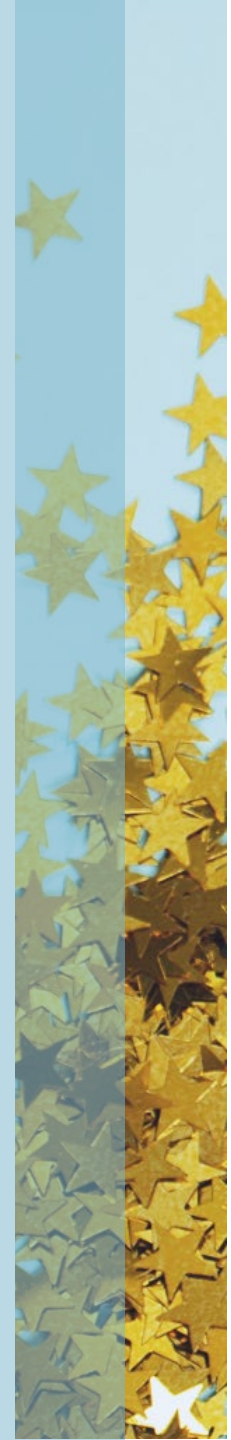
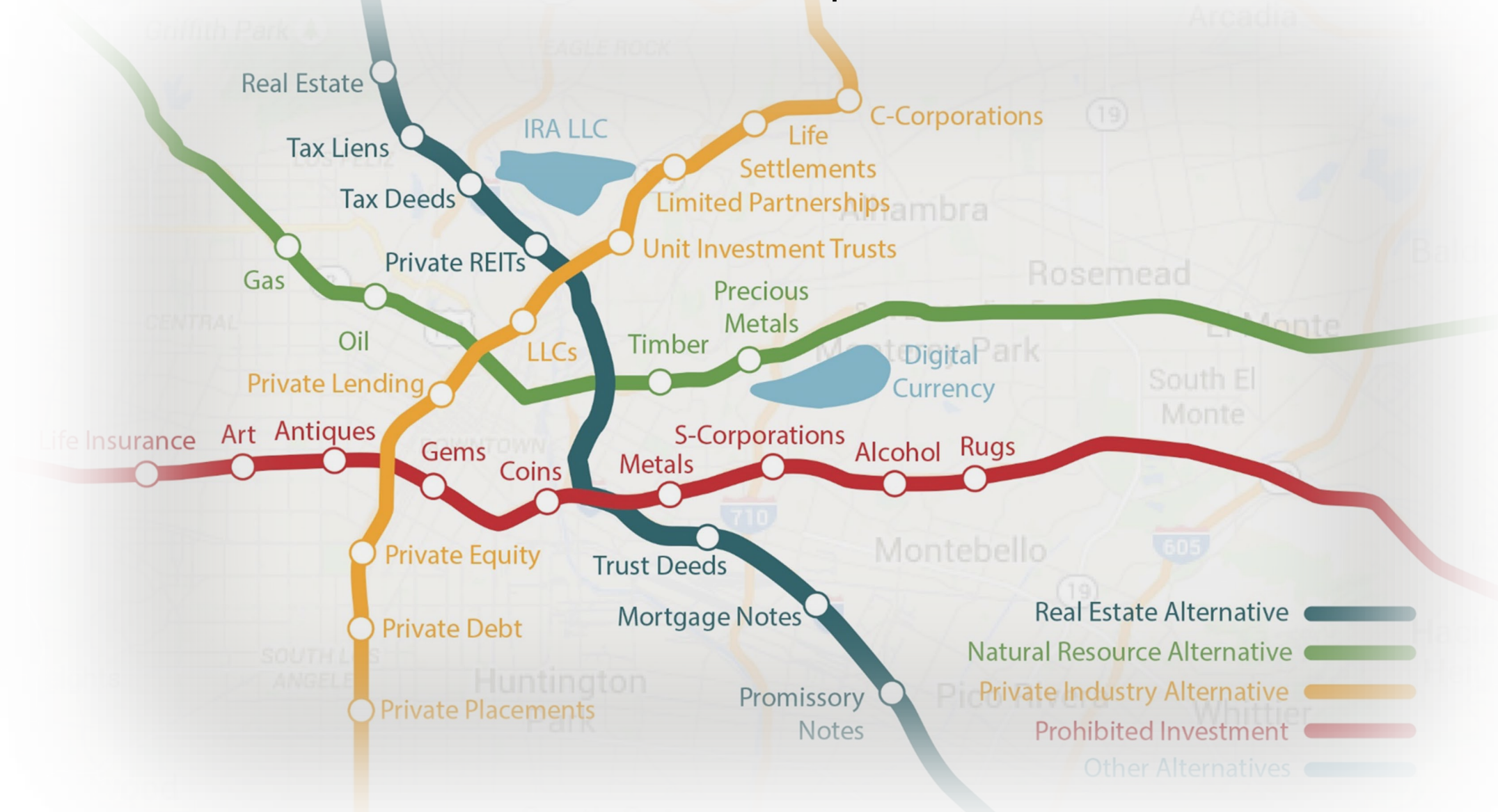
STEP  
4

Receive Income  
into SDIRA from  
Investment Tax-  
Free or Tax-  
Sheltered



# ALLOWABLE INVESTMENTS

Self-Directed IRA Opens the Door





# COST OF A SDIRA

No hidden fees.

## IRA Account Establishment Fee

\$50

The IRA Account Establishment Fee is a one time fee to establish the IRA Account. This fee can be paid by check, credit card, or authorized by the IRA Account Owner from the initial transfer of funds to the IRA Account.

## IRA ACCOUNT ADMINISTRATION FEE

IRA Account Value	Annual IRA Account Administration Fee
\$0 - \$50,000	\$300
\$50,001 - \$100,000	\$400
\$100,001 - \$200,000	\$500
\$200,001 - \$300,000	\$600
\$300,001 - \$400,000	\$700
\$400,001 - \$500,000	\$800
\$500,001 - \$600,000	\$900
\$600,001 and up	\$1,000

## IRS ALLOWED ALTERNATIVE INVESTMENTS

### Alternative Investment Transaction Fee

\$200

If the investment type is not listed above in the Fee Schedule an Alternative Investment Transaction Fee will apply upon the initial funding, subsequent purchases and final payoff of the transaction from the IRA. Investments **not allowed** are life insurance and collectibles.

# FULL SERVICE

- ★ Annual tax documents and IRS reporting
- ★ Processing of contributions and distributions
- ★ Online account portal
- ★ Annual statement packages
- ★ Monthly statement packages
- ★ Phone and email support
- ★ Continuing education



# PREFERRED TRUST COMPANY



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