

1.888.990.7892



# Plan Your Trip to a Comfortable Retirement

The summer season is here! Many of us are thinking about summer vacations and exploring new places. Big trips take a lot of planning and preparation, just like the journey to retirement.

A little effort and planning can impact how quickly you get to your destination. Even small contributions of \$25 a month can add up, making a big difference down the road.

Consider setting up automatic contributions each month to build a tidy sum for your next alternative investment. By growing the retirement funds in your self-directed IRA, you can help ensure your vacations continue after retirement.

Want to make contributions to your IRA as easy as summer breeze? Set up automatic direct deposit from your checking or savings account!

To make a contribution, follow these steps:

1. Login to your Online Account Portal (Watch this video for help logging in.)

## 2. Select the Accounts icon



#### 3. Select the Forms Link



4. Scroll down and select your preferred contribution form



### E-Sign Contribution Form

Fast, easy and secure - complete and submit online.

## Printable PDF

Complete, print and sign, then mail to us at 6700 Via Austi Parkway, Suite 301, Las Vegas, NV 89119.

5. Send or Submit!



Have questions or need help? Our Preferred Trust Company team is here for you! Call or email us at <u>888.990.7892</u> or <u>info@ptcemail.com</u>.

PREFERRED TRUST COMPANY, LLC ("Preferred Trust") | 6700 Via Austi Parkway | Suite 301 | Las Vegas, NV 89119 | 702.990.7892 | www.preferredTrustcompany.com | Financial Institutions Division of Nevada License No. TR10025. Preferred Trust performs duties of a custodian and as such, does not sell investments or provide investment, tax, or legal advice. Preferred Trust is committed to safegurarding all non-public personal information provided to us by our customers. Preferred Trust collects, retains, and uses customer information where we reasonably beleve that it will help administer our business or provide services to our customers. We collect and retain customer information only for specific business purposes and upon request will inform customers why we are collecting and retaining the information. We use information to protect and administer records, accounts, and funds, to comply with certain laws and requisitions, to help us design or improve our services, and to understand the financial needs of our customers. Preferred Trust is an accredited member of the Better Business Bureau.

Preferred Trust Company, LLC, 6700 Via Austi Parkway, Suite 301, Las Vegas, Nevada 89119, 702.990.7892 | 888.990.7892 Unsubscribe Manage preferences