

## LLC FORMATION REFERRALS

Below is a list of contacts other Entrust account holders have used to establish single-member LLCs (also known as IRA LLCs). Local providers are listed by state. Note that we do not have contacts in every state. If your state is not listed, the national providers listed should be able to assist you.

### ◆ NATIONAL PROVIDERS

#### Paramount Documents

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##### ■ Katie DeYoung

- (602) 316-8807
- [katie@paramountdocuments.com](mailto:katie@paramountdocuments.com)
- [www.ParamountDocuments.com](http://www.ParamountDocuments.com)
- Katie is able to assist clients with preparing and executing IRA LLCs in all 50 states. Services include:
  - Filing the LLC
  - Obtaining the FEIN/Tax ID Number
  - Drafting the Operating Agreement which includes self-directed IRA language per the IRS Rules and Regulations and has been approved by Entrust

#### Asset Protection Services of America

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##### ■ Jay Butler

- Office: (775) 461-5255
- [info@AssetProtectionServices.com](mailto:info@AssetProtectionServices.com)
- [www.assetprotectionservices.com](http://www.assetprotectionservices.com)
- Jay Butler is the Managing Director of Asset Protection Services of America, the former Managing Director of Asset Protection Services International, Ltd and the former Vice-President of Sales and Marketing for Corporate Support Services of Nevada Inc. Mr. Butler holds a Bachelor's Degree of Fine Arts from Boston University. Jay has provided customized business entity structuring for clients in all 50 states along with some of the most respected names in the industry including the Jay Mitton organization "the father of asset protection" and Real Estate Investor Association seminars.

## ReSure LLC

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- ReSure LLC, under the leadership of Bernard Reisz CPA, CPCU, ARM, ACI, is a nationally recognized leader in SDIRA support services and tax expertise. ReSure maintains an A+ rating with BBB with numerous 5-Star glowing reviews. ReSure has assisted thousands of SDIRA investors, nationwide, with an array of formation and advisory services.
- ReSure is well versed in the nuances of LLCs in every domicile and can help you select your LLC state and structure with honest expertise, addressing cost, asset protection, privacy, and tax considerations.
- ReSure offers a comprehensive and discounted service for Entrust Group clients, which includes LLC domicile and management structure discussion, LLC formation, EIN, bank account, SDIRA-LLC Operating Agreement, and IRA compliance & strategy training.
- The service begins with an initial 25-minute discussion, with further discussion time available as needed to complete the service.
  - ReSure's Better Business Bureau profile:  
[www.bbb.org/us/ny/new-york/profile/tax-consultant/resure-llc-0121-170719](http://www.bbb.org/us/ny/new-york/profile/tax-consultant/resure-llc-0121-170719)
  - Link to Entrust Group Client Comprehensive and Discounted Service:  
[www.live.vcita.com/site/resurefinancial/online-scheduling?service=8ch3k6n4eons5gdh](http://www.live.vcita.com/site/resurefinancial/online-scheduling?service=8ch3k6n4eons5gdh)

## ◆ STATE PROVIDERS

### ◆ ARIZONA

#### Keyt Law

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- **Richard Keyt**  
Estate Planning and Business Attorney  
3001 East Camelback Road, Suite 130  
Phoenix, AZ 85016  
(602) 906-4953, ext. 1  
[rickkeyt@keytlaw.com](mailto:rickkeyt@keytlaw.com)

### ◆ CALIFORNIA

#### Lowthorp, Richards, McMillan, Miller & Templeman

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- **Kenneth High**  
300 Esplanade Drive, Suite 850  
Oxnard, CA 93030  
(805) 981-8555  
[khigh@lrmmt.com](mailto:khigh@lrmmt.com)

## Keller Williams Coe Real Estate

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- **David Coe**

1601 Pacific Coast Hwy #265  
Hermosa Beach, CA 90254  
(310) 466-0021  
[david@coerealtor.com](mailto:david@coerealtor.com)

## ♦ COLORADO

### James H. Morgan, LLC

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- **James H Morgan, J.D., LL.M. (Tax), CFP®**

Estate Planning and Business Attorney Certified Financial Planner™

1900 Wazee Street, Ste 300  
Denver, CO 80202  
Office: (303) 457-9500  
Cell: (303) 549-5089  
Fax: (303) 942-3598  
[jim@jimlaw.net](mailto:jim@jimlaw.net)  
[www.jamesmorganlaw.com](http://www.jamesmorganlaw.com)

## ♦ FLORIDA

### Smoler & Associates, P.A.

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- **Bruce J. Smoler, Esp.**

2611 Hollywood Boulevard  
Hollywood, FL 33020  
(954) 922-2811  
[bruce@smolerpa.com](mailto:bruce@smolerpa.com)

## ♦ GEORGIA

### The Oaks Group, Inc.

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- **Dyches Boddiford**

P.O. Box 505  
Marietta, GA 30061  
[DB@assets101.com](mailto:DB@assets101.com)

◆ **MISSOURI**

**Michael Sewell, JD, MBA**

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- **9378 Olive Blvd., Suite 211**  
St. Louis, MO 63132  
(314) 942-3232  
[www.SewellLaw.net](http://www.SewellLaw.net)

**Husch Blackwell LLP**

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- **Patrick T. Conner**  
190 Carondelet Plaza, Suite 600  
St. Louis, MO  
(314) 480-1637  
[Patrick.Conner@huschblackwell.com](mailto:Patrick.Conner@huschblackwell.com)