

## 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

#### ReSure LLC

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- Offers a discounted fee for Entrust clients of \$650. It is a full turn-key solution to set up the LLC and open a bank account online. Click [here](#) to make an appointment to chat with someone from ReSure.

#### Paramount Documents

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- **Katie DeYoung**

- (480) 430-9590
- [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.

## Incorporate.com

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- Incorporate.com appreciates the opportunity to work with Entrust clients to help them form LLCs in an expeditious, professional fashion and maintain compliance with the Secretary of State on an ongoing basis. Here are our two relevant packages for LLC formation:
  - **Starter Package:** Service fee ranges from \$79 (Delaware or Nevada entity) to \$99 (all other US jurisdictions) plus state fees. Package Includes:
    - Completion and filing of LLC formation documents
  - **Works Package:** Service fee ranges from \$279 (Delaware or Nevada entity) to \$349 (all other US jurisdictions) plus state fees. Package Includes:
    - Completion and filing of LLC formation documents
    - Corporate Kit (company seal and organizing documents)
    - Obtain EIN (Employer Identification Number) from IRS
    - Operating Agreement
- To provide ongoing maintenance of the entity with the Secretary of State, we can provide our Registered Agent and Annual Report Filing Service to The Entrust Group's clients for a reduced rate of \$179.00 per year, plus the state fees related to the Annual Report filing.
- For this reduced annual cost (standard cost of ongoing compliance is \$385 per year plus state fees), Entrust clients will avoid missing an Annual Report due date, which can have major consequences. An LLC's good standing status and even its rights to exist can be jeopardized by ignoring annual report requirements. An LLC may also incur monetary penalties for not filing its report on time.
- To refer your clients to incorporate.com and take advantage of these special rates, please find the contact information for our Partner Service team:

**The Entrust Group's Partner ID:** 107250 (This number allows us to ensure the appropriate discounts are applied)  
**Partner Service line:** (302) 636-8805  
**Partner Service email address:** [affiliateinfo@incorporate.com](mailto:affiliateinfo@incorporate.com)

## ◆ 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

#### Trowbridge & Taylor LLP

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- **Gene Trowbridge, Esq., CCIM, CDEI**  
25422 Trabuco Rd., #105-244  
Lake Forest, CA 92630  
(949) 855-8399  
[Gene@GeneTrowbridge.com](mailto:Gene@GeneTrowbridge.com)

#### 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

**◆ GEORGIA****The Oaks Group, Inc.**

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- **Dyches Boddiford**  
P.O. Box 505  
Marietta, GA 30061  
[Info@assets101.com](mailto:Info@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)

◆ **NORTH CAROLINA**

**The Hart Law Group**

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■ **Mary Hart**

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Asheville, NC 28801

(828) 271-4278

[MaryHart@TheHartLawGroup.com](mailto:MaryHart@TheHartLawGroup.com)