

The Basics of Real Estate IRAs

2 Hour Live Continuing Education Credit Course

Approved by the California Bureau of Real Estate

This is an introductory course on self-directed retirement plans for investments in real estate. It will give you a basic knowledge of how an IRA can be used to purchase a real estate property. Important eligibility requirements, limits, and characteristics of each retirement plan will also be discussed.

Additionally, the course will give an overview of real estate investment possibilities and restrictions, including how to comply with IRS rules that apply to self-directed retirement accounts.

The course will conclude with a case study involving a direct purchase of a real estate property through a self-directed retirement account. An overview of the operating and selling process that follows the investment will also be included.

Learning Objectives:

- ◆ Explain the difference between various retirement accounts
- ◆ Identify different types of non-traditional investments permitted in an IRA
- ◆ Explain the techniques and methods used in real estate investing through a self-directed retirement account
- ◆ Demonstrate a creative approach to real estate related investment opportunities



Course details:

- ◆ Program Level: Basic
- ◆ Delivery Method: Live
- ◆ Category: Consumer Service
- ◆ Credit Hours: 2 Hours
- ◆ Location: 14895 East 14th Street
San Leandro, CA 94578

The Basics of Real Estate IRAs

2 Hour Live Continuing Education Credit Course

Approved by the California Bureau of Real Estate

Instructor Information - William Neville:

William Neville is a Business Development Manager for The Entrust Group in Oakland, CA. William has 25 years of experience, having held various positions in accounting, finance and operations management. Over the years, William has given several presentations to investment groups regarding self-directed IRAs, specifically focused on real estate investing. He briefly worked as a Financial Advisor at Edward Jones from 2009- 2010, where he received Series 7 and 66 licenses. William has a B.S. in Finance from Pennsylvania State University.



Examination Requirements:

An open book final exam utilizing the handout materials will be given at the end of the class. The exam consists of 15 multiple choice questions. The attendees will have 15 minutes to complete it. A passing score of 70% is required to receive continuing education credits. If the attendee fails the exam, he/she can retake it one time only. If the attendee does not pass the 2nd exam, he/she will have to retake the class to receive continuing education credits.

This course is open to anyone who needs two hours of CE credit. Real estate professionals should visit the CalBRE website for continuing education requirements.

Sponsor Information:

Entrust Administration, Inc.
CalBRE Sponsor ID Number: 4231
555 12th Street, Suite 1250
Oakland, CA 94607
Phone: (800)392-9653; Email: teg@theentrustgroup.com

This course is approved for continuing education credit by the California Bureau of Real Estate. However, this approval does not constitute an endorsement of the views or opinions which are expressed by the course sponsor, instructor, authors or lecturers.
