

Private Equity Investing: Insights from an Industry Expert



Featuring:  Justly
by Ideanomics





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All information and materials are for educational purposes only. All parties are encouraged to consult with their attorneys, accountants and financial advisors before entering into any type of investment.

Agenda

- 1 Introducing Entrust & Justly
- 2 Talking Private Equity With Paul
- 3 Answer Remaining Questions
- 4 What's Next With Entrust

Meet Your Host

Tony Unkel

Business Development Manager at The Entrust Group



Years at Entrust



Educating investors and professionals on tax-preferred retirement accounts

About Entrust



|
\$4B

Assets Under
Administration



|
45k

Investors
Empowered



|
40+

Years in
Business



|
1

Point of
Contact

About Entrust



- Self-Directed IRA administrators
- Knowledgeable staff with CISP designations
- Nationwide offices
- In-person events and virtual webinars
- National Continuing Education program for other credentials
- Bi-annual IRA Academy

What is a Self-Directed IRA?



A retirement account in which the individual investor is in charge of making all investment decisions



Greater opportunity for asset diversification outside of traditional stocks, bonds, and mutual funds



All securities and investments are held in a retirement account administered by a regulated custodian or trustee

Let's Talk
Private Equity



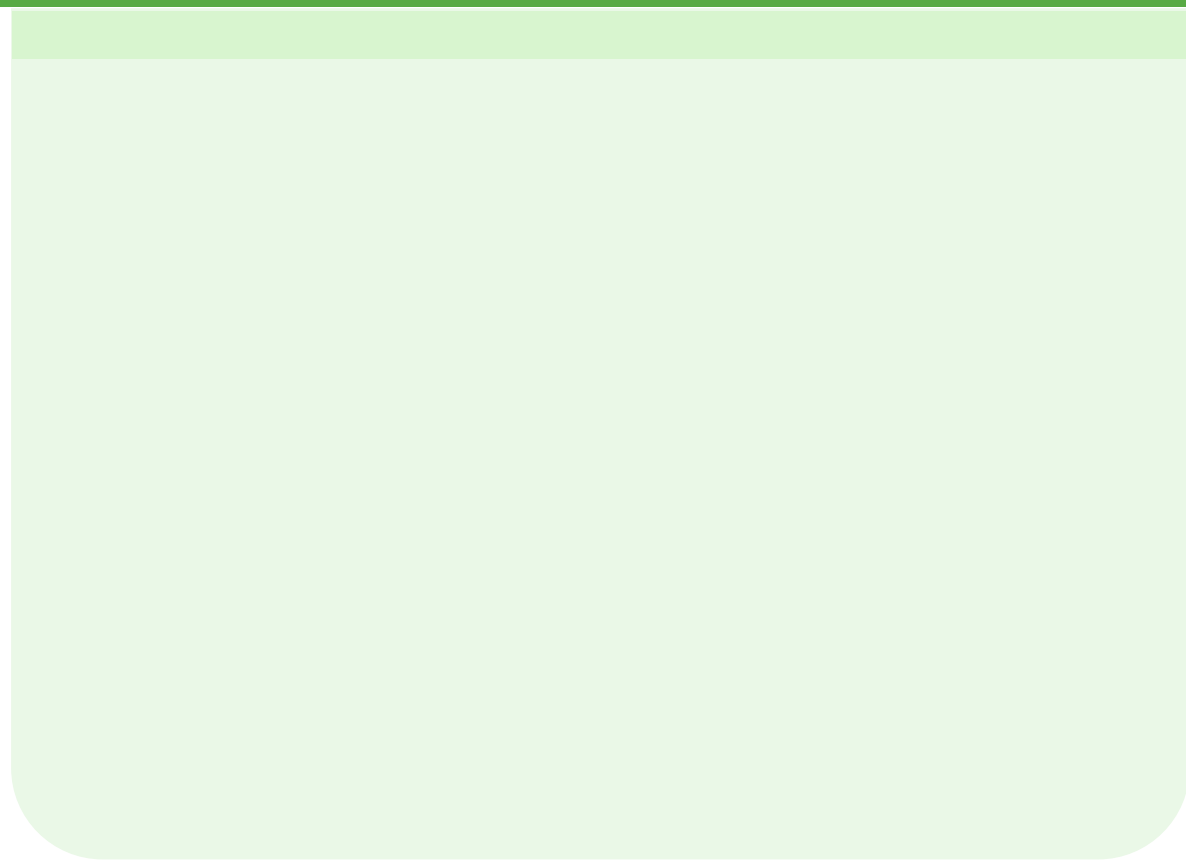
What is Private Equity?

Let's Take A Poll

Do you have any private equity investments?

- ✦ Yes
- ✦ No
- ✦ I did not know I could invest in private equity

How are private equity investments unique?




What are some
modern examples?

Let's Take A Poll

Do you have any IMPACT / ESG investments?

- ✦ Yes
- ✦ No because it's a fad
- ✦ No because of greenwashing
- ✦ What is impact / ESG Investing?

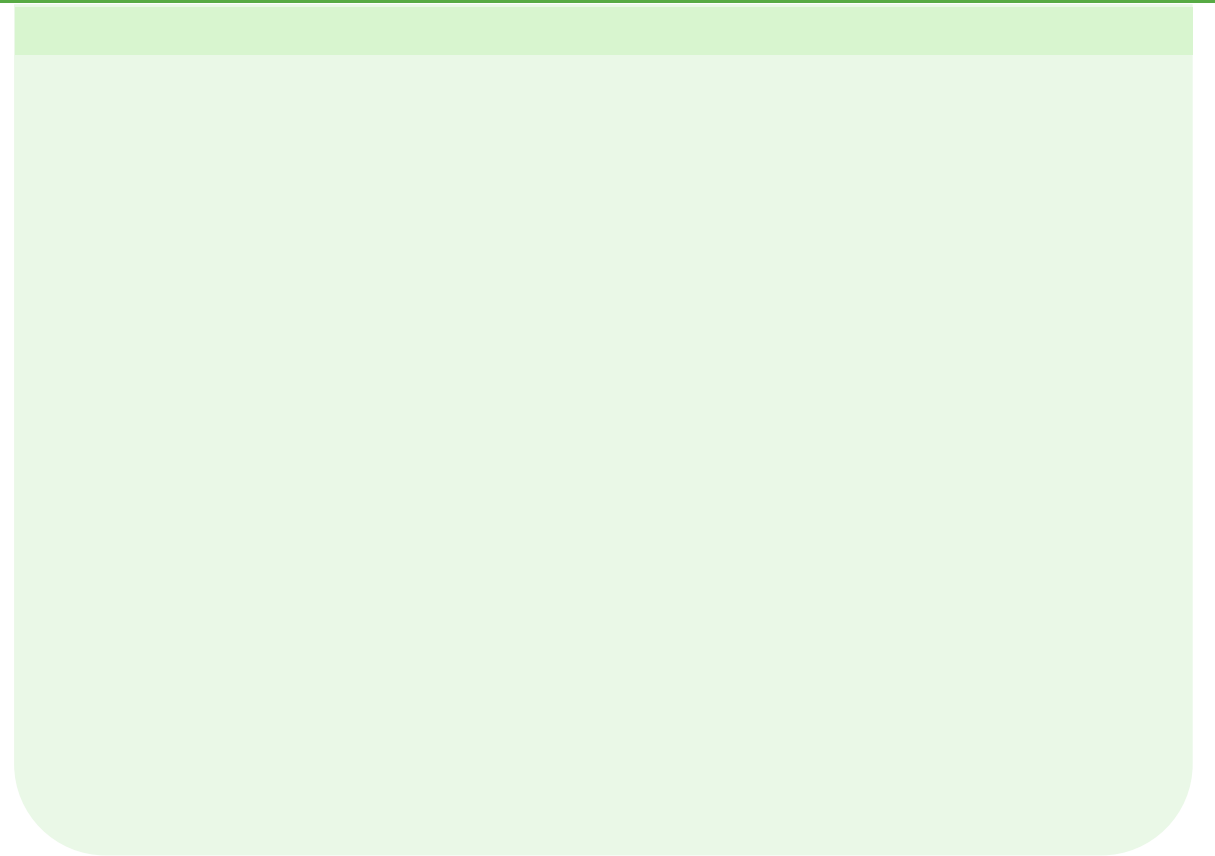


What is trending in private equity?

What is the typical
investment process?

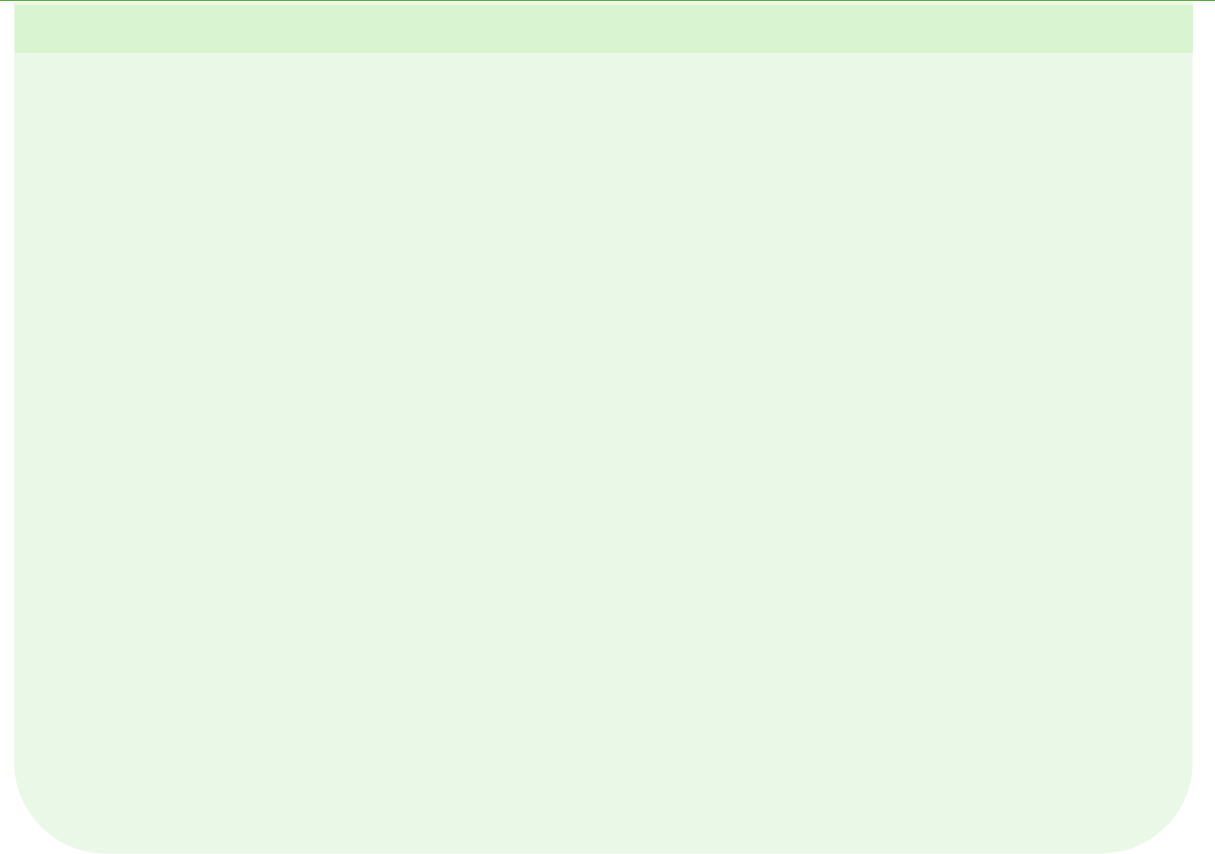
What are the
potential risks?

What are the most common reasons for private equity investments to fail or underperform?



How do individuals and
firms exit investments?

How can investors assess the credibility and track record of a private equity firm?



Let's Take A Poll

If you were to invest in private equity, what would you invest in?

- ❖ Real Estate
- ❖ Cures for diseases
- ❖ Technology
- ❖ Companies that have a social and environmental impact

How can investors
access this market?

What's required?



What's Next
With Entrust?

What's Next?



New Webinar – *Investing in Self-Storage: What You Need To Know*

➔ Register today & join us on May 17!



Have feedback or topic requests?

➔ Let us know in the survey as you leave



Need more information on SDIRAs?

➔ Visit our website and Learning Center



Follow us on social media for updates



Any More Questions?



Stay Connected



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An **investment in knowledge**
pays the best interest.

- *Benjamin Franklin*

