



# Expanding Your IRA Investment Strategy With An Expert Roundtable





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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 any type of investment.

# Today's *Agenda*

- ❖ Talking Alternative Asset Trends
- ❖ Roundtable Rapid-fire: New Technologies, Finding Investments & Minimizing Risk
- ❖ Q&A Time





# Meet **Your Host**



## Rachel Stolrow



7 Years at Entrust



Educating investors and professionals on tax-preferred retirement accounts



Education Statement

# Meet Your Roundtable



Whitney Elkins-Hutten

[PassiveInvesting.com](https://PassiveInvesting.com)



Louis O'Connor

Strategic Metals Invest



Matt Blackwell

Reliant Real Estate Management



# About Entrust



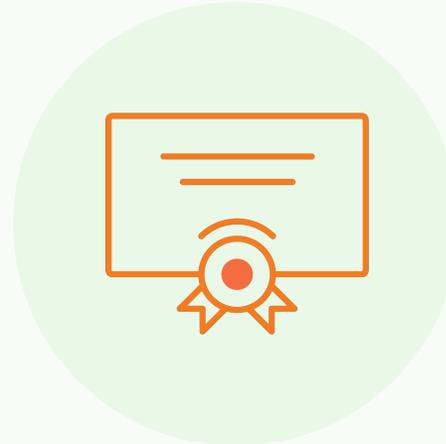
**\$5B**

Assets Under  
Administration



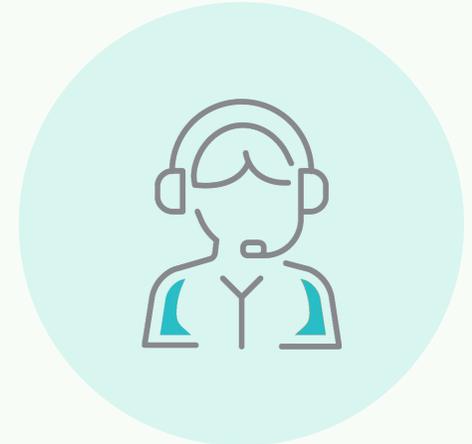
**45k**

Investors  
Empowered



**40**

Years of  
Service



**1**

Point of  
Contact



# Who *Are We*?





# Who Are We?



**Self-Directed IRA Administrators**





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**Self-Directed IRA Administrators**



**Knowledgeable Staff with  
CISP Certifications**



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**Monthly Educational Webinars**





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**Monthly Educational Webinars**



**Annual IRA Academy**



# What's Trending?

Let's Dig In!



Which trends are **driving**  
**your industry** this year?

How are **macroeconomics**  
**affecting your industry?**

How does your understanding of market cycles help prepare you to **succeed in times of market prosperity and turmoil?**

**Poll:** What is the biggest hurdle you have as an investor facing major industry forces & trends?

# Roundtable Rapid-fire

Let's Do It!



Which technology is moving  
markets in your industry?

Which data do you look for to  
**research markets and find  
investment opportunities?**

How can you analyze  
this information to  
**identify market insights?**

Where do you  
**find this information?**

**Poll:** Are you confident in your knowledge of what data you should learn, and where to find reliable sources of that data?

Which **methods** are being  
**used** in scam attempts?

**Poll:** Have you seen or been targeted by a potential scam?

What are the top  
**warning signs to beware?**

# Let's Wrap Up

And Answer Your Questions!





# Getting Started **in 3 Easy Steps**



**Open** an  
Entrust Account



# Getting Started *in 3 Easy Steps*



**Open** an  
Entrust Account

**Fund** Your  
Account



# Getting Started *in 3 Easy Steps*



**Open** an  
Entrust Account

**Fund** Your  
Account

**Purchase**  
Your Asset



# What's **Next?**

## **Upcoming Webinar: Investing in Private Equity With Your IRA**

Register today & join us April 24th!

## **Want to learn something new?**

Let us know in the survey as you leave





# What's **Next?**

**Need more information on SDIRAs?**

Visit our website and Learning Center

**Follow us on social media for updates**





# Question & Answer Session



# Stay Connected



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Whitney Elkins-Hutten

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**Learning** gives CREATIVITY

Creativity leads to THINKING

Thinking provides KNOWLEDGE

Knowledge makes you GREAT

*- Abdul Kalam*

