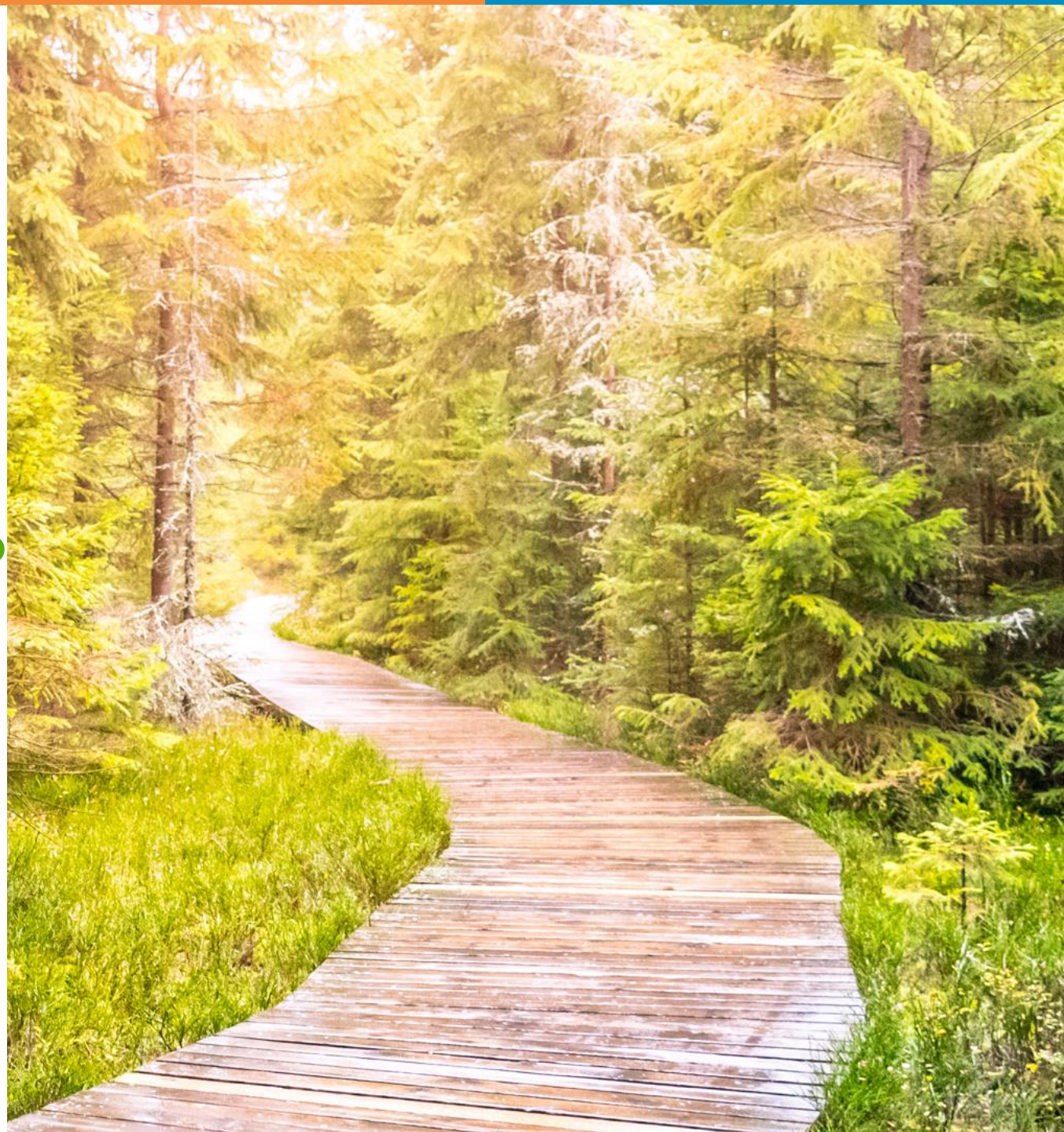


Self-Directed IRAs: What Do You Want To Know?





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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 Self-Directed IRA Basics
- 2 Self-Directed IRA Q&A
- 3 What's Coming Up Next

Meet Your Presenter

John Paul Ruiz

Director of Professional Development at The Entrust Group



27

Years of retirement education development



Educating investors and professionals on tax-preferred retirement accounts



CISP & QKA certified

About Entrust



\$4B

Assets Under
Administration



22k

Active
Accounts



40

Years of
Service



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

Self-Directed IRA Basics

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

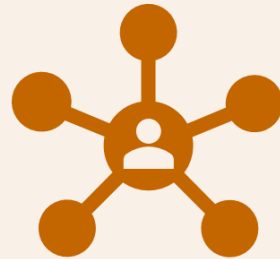


All securities and investments are held in a retirement account administered by a regulated custodian or trustee

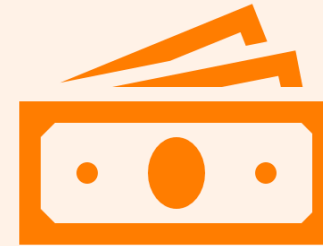
Benefits of Self-Direction



Take Control



Diversification



Tax Benefits

Self-Directed IRA Q&A

Time for Questions



What's Next?

What's Next?



Upcoming Webinar – Mark Your Calendars: What IRA Holders Should Know About 2022

➡ Register today & join us on January 26!



Have feedback or want to learn something new?

➡ Let us know in the survey as you leave



Need more information on SDIRAs?

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John Paul Ruiz



Director of Professional Development



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(510) 316-0488

Always Remember . . .

“

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

- Benjamin Franklin

