

SDIRA Investing in Start-Ups Before the Public





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Agenda

- 1 Introducing Entrust & Karmic Payback
- 2 How pre-IPO investing empowers investors
- 3 Utilizing Einstein's 'Rule of 72'
- 4 The flow of a pre-IPO's capital raising lifecycle
- 5 Which six sectors are trending per market experts
- 6 Q&A Time

Meet Your Host

Munzer Ghosheh

Business Development Manager at The Entrust Group



20

Years experience in finance and real estate



Educating investors and professionals
on tax-preferred retirement accounts



CISP certified

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

How to Buy Hot Stocks Before the Public is Allowed

WELCOME

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contact: info@karmicpayback.com

Introductions

Roy Mullin

Allen Sanders

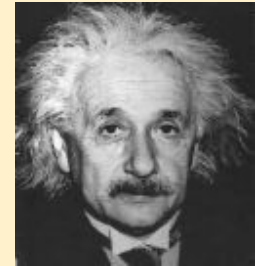
Overview of Presentation

Rule of 72

Long Term Savings and Investments

Use The Rule of 72 to Outpace Inflation¹

Divide 72 by the interest rate to estimate the number of years it takes for your money to double.



4%		12%	
Savings doubles every 18 yrs		Savings doubles every 6 yrs	
20	\$10,000	20	\$10,000
38	\$20,000	26	\$20,000
56	\$40,000	32	\$40,000
		38	\$80,000
		44	\$160,000
		50	\$320,000
		56	\$640,000

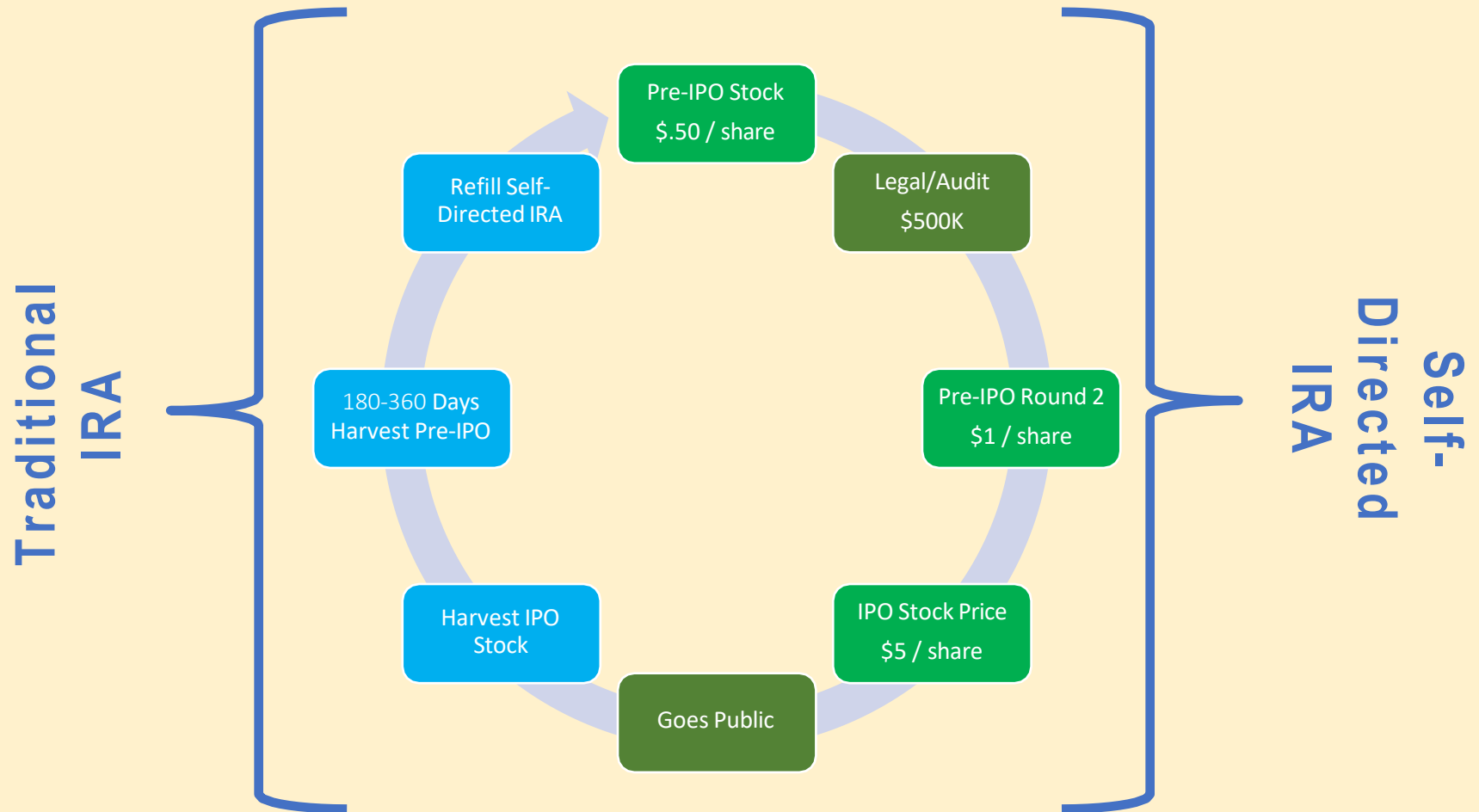
¹All figures are for illustrative purposes only and do not reflect an actual investment in any product. They do not reflect the performance risks, expenses or charges associated with any actual investment. Past performance is not an indication of future performance. The Rule of 72 is a mathematical concept that approximates the number of years it would take to double the principal at a constant rate of return. The performance of investments fluctuates over time, and as a result, the actual time it will take an investment to double in value cannot be predicted with any certainty.

Pre-IPO/OTC explanation

Restricted Stock

Life Cycle of a Deal

Pre-IPO/OTC Lifecycle



Must use a Self Directed IRA (SDIRA)

(move your old 401ks and IRAs to Entrust)

Accredited Investor

Roth vs Traditional

Six Sexy Sectors:

- **Technology/SaaS**
- **Infrastructure**
- **Space/Aviation**
- **Medical**
- **Cyber Security**
- **Green**

Pre-IPO/OTC and IPO/OTC (opening bell)

Priority Group

Case Studies

THANK YOU

roy@roymullin.com

What's Next?



Upcoming Webinar – *Colombia: 10 Reasons to Get Familiar with Foreign Investments*

➔ Register today & join us on March 15!



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



Time for Questions



Stay Connected



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Learning gives CREATIVITY
Creativity leads to THINKING
Thinking provides KNOWLEDGE
Knowledge makes you **GREAT**

- Abdul Kalam

