

# An Exclusive Self-Directed IRA Q&A





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# Agenda

- 1 Introducing Entrust
- 2 Answering Your SDIRA Questions
- 3 What's Next With Entrust

# Meet Your Presenter

Mindy Gayer

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

# Before We Begin

## How familiar are you with SDIRAs?

- ❖ I am an SDIRA holder
- ❖ I am familiar and want to confirm if I should open an IRA
- ❖ I am here to learn the basics about SDIRAs



# *Answering Your IRA Questions*





What is the minimum amount to start an account?

## Self-Directed IRA Partnering

- ❖ Am I able to invest in land or real estate that my child can live in during college?
- ❖ Also, can I partner with my spouse's IRA to start an LLC for our real estate investments?

How can I get excellent investment coaching?

## Real Estate IRAs

- ✦ Can you buy land with a self-directed traditional IRA and build an investment residence on the land using a self-directed Roth IRA. If so, what are the caveats of doing so, and is it a bad idea?

## Real Estate IRAs

- ✦ Can you please discuss real estate lending/mortgage notes? Common pitfalls to avoid?

## Real Estate IRAs

- ✦ Can you please provide an overview of the steps required to purchase real estate with my SDIRA?

What constitutes self-employed?  
I am retired, what do I need to  
do to set up an SDIRA?



## IRA LLCs

- ✦ When setting up an LLC, what steps do I need to take to make sure I'm properly incorporated? Can I alter LLC terms after establishment?



Can you discuss purchasing  
Bitcoin with my SDIRA?

## IRA Investment Marketplaces

- ✦ Does Entrust have a platform that I can easily select an asset and invest?

## SDIRA Exit Strategies

- Sell the Asset
- Full In-Kind Distribution
- Partial In-Kind Distribution (involves re-titling the investment)
- Pass along to beneficiaries

**Any More Questions?**



*What's Next  
With Entrust*



# What's Next?



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

➔ Register today & join us on June 14!



## **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**



# Stay Connected



## Mindy Gayer



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“

Learning gives CREATIVITY

Creativity leads to THINKING

Thinking provides KNOWLEDGE

Knowledge makes you **GREAT**

*- Abdul Kalam*

