

# IRAs & Energy Investments: Expert Advice and How-Tos







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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 & Cory
- 2 Introduction to Minerals
- 3 How to do Research & Due Diligence
- 4 Why Use an IRA
- 5 How to Get Started
- 6 Q&A Time

# 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



**\$5B**

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

# “Oil & Gas Mineral Rights - A Valuable Real Estate Asset”

Derreck Long, CISP  
Sen. Wealth Manager







**SD-IRA Expert, working  
with some of the top  
minds in the industry**

**Seen over 100 Thousand  
Self Directed IRA  
investments**

**Presented at Congress on  
SECURE ACT**





# Ways To Invest In Oil And Gas

## Working Interest

- ✓ High Risk | High Reward
- ✓ Large Tax Deductions
- ✓ Most Common Way To Invest
- ✓ Scam's

## Mineral Rights

- ✓ Low Risk
- ✓ Real Ownership (Hard Asset)
- ✓ Able To Track



# WHAT IS AN OIL & GAS MINERAL RIGHT?

- **#1 – It is a real property that is owned via a recorded deed and title**
- **#2 – It is the rights BELOW the surface to all natural resources**
- **#3 – The owner is not liable for drilling, exploration, production, environmental, or any capital costs**
- **#4 – It is a passive recipient to a royalty percentage of all gross proceeds for all oil and gas extracted from the mineral rights owned**
- **#5 – It is like any other parcel of real estate, as it is owned, sold, and treated as a tangible asset**
- **#6 – Mineral rights are top of the food chain in terms of ownership, rights of distributions, and all royalty income distributed every single month**





Air Rights

Surface Rights

Mineral Rights



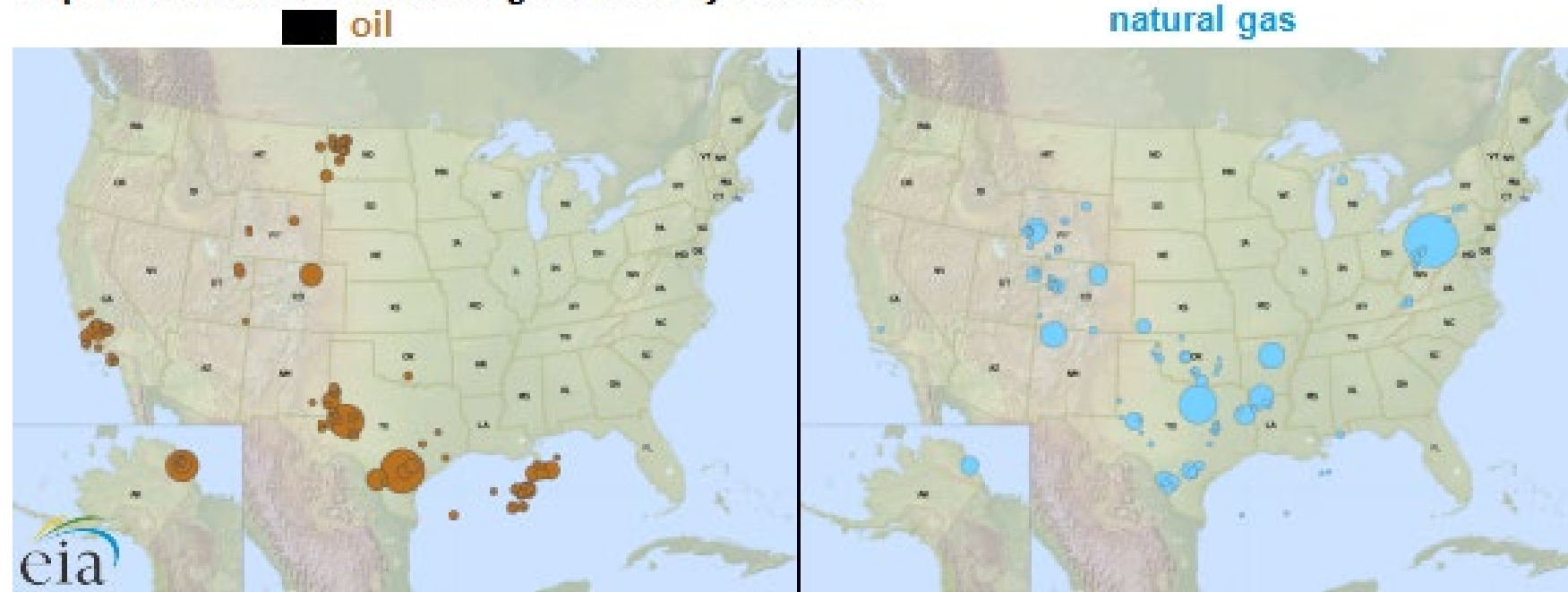


Like any other parcel of real estate, it is about the location, the economics, the tenants, the timing, the intrinsic values, and the free cash flow!





Top 100 U.S. oil and natural gas fields by reserves



# The US is Saturated in Petroleum Reserves!

What a difference in 30 years!



The top maps show what was known as the top 100 oil and gas fields pre-2000. Now, the lower map reflects in the pink shaded colors the enormous exposure and results of horizontal drilling and frack stimulations for shale plays that were discovered using modern technology.







## WHY WERE OIL & GAS MINERAL RIGHTS NOT AVAILABLE TO INDIVIDUAL HIGH-NET-WORTH INVESTORS 5 TO 10 YEARS AGO?

- **#1** – Technology allowing 95% success in exploration did not take place until about 13 years ago – Mineral acquisitions were very risky
- **#2** – Shale exploration is enormous in geographical size and economic potential but is a \$1-2 trillion asset class that has just starting evolving
- **#3** – The 800-pound gorillas (Wall Street) started initially and there was little room for the smaller players like Eckard and their Partners/investors



## Acquiring Minerals – How Does It Balance With Traditional Real Estate?



- #1 – MR do not have any holding costs
- #2 – MR have zero capital costs, expenses, or capital exposure
- #3 – MR are held in perpetuity
- #4 – MR get free cash flow distributions every single calendar month





# Passive Income

## How can real estate be truly passive if you are liable for:

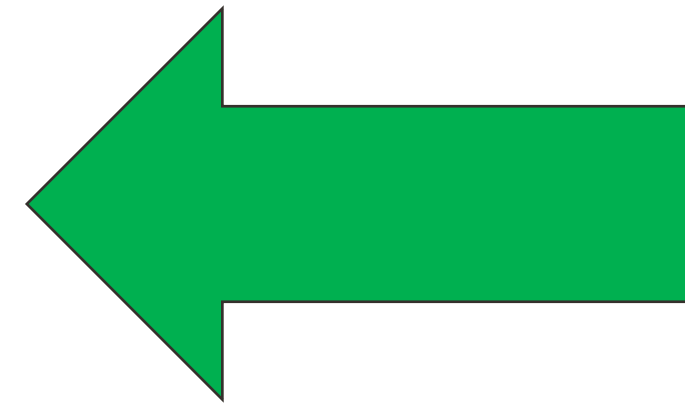
- Management fees
- Tenant improvements
- Property taxes
- Repairs and maintenance
- Operating expenses
- Insurance expenses
- Vacancies and commissions
- Exposure to cash flow disruptions via rent forbearance



# Passive Income

## The #1 Passive Income Generator Available: Oil and Gas Mineral Rights

- No costs
- Monthly distributions
- No management fees
- No expenses
- No property taxes
- No liability
- No capital calls
- No equity sharing



**The Only Passive Income Source Like It!**



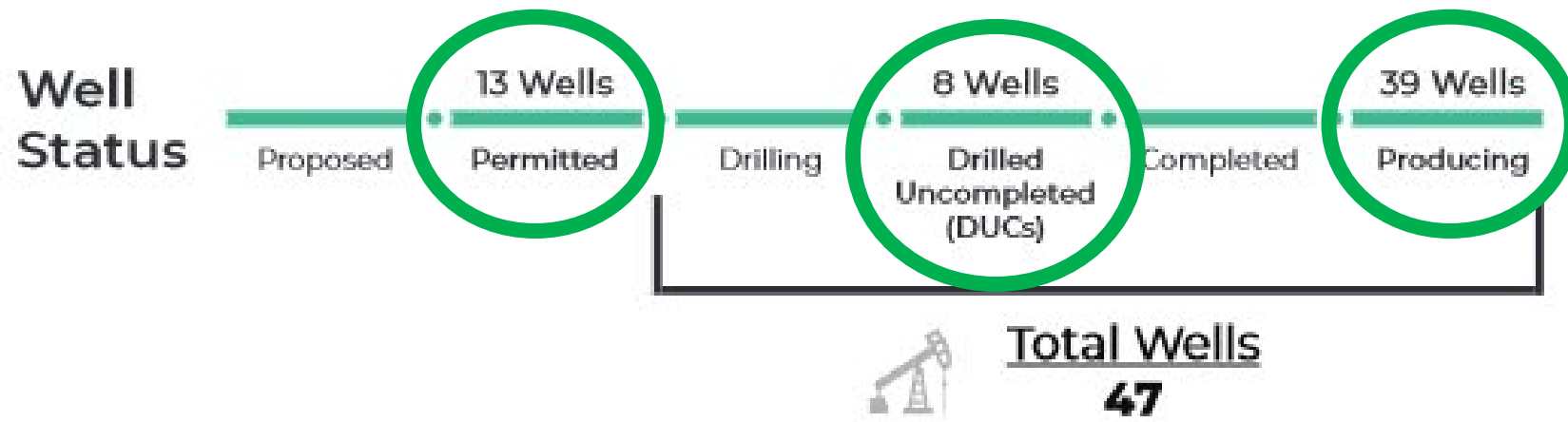
# What Does An Investment Look Like



# What Does The Investment Look Like?

## ELA WILD TURKEY MINERAL SUMMARY

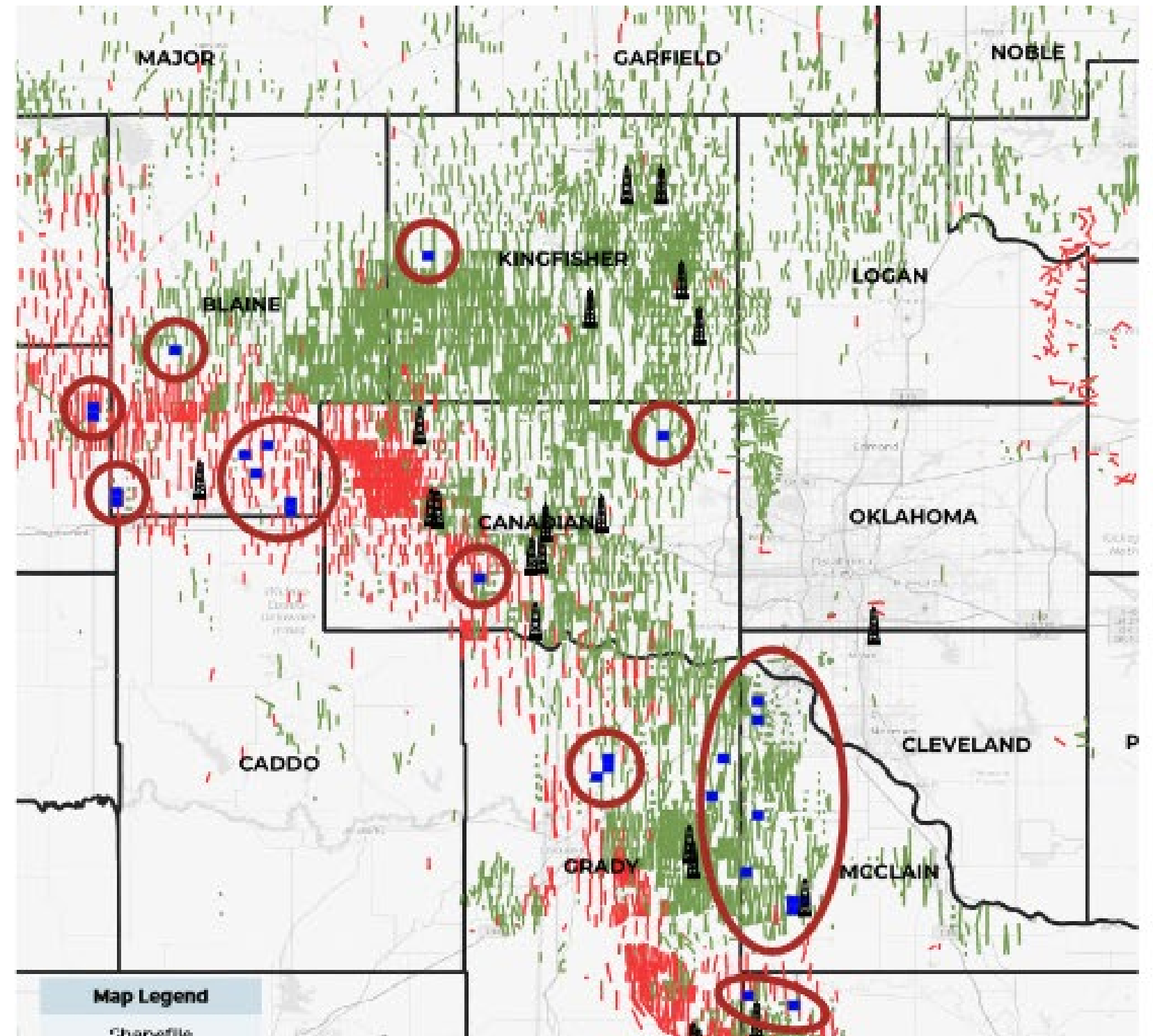
**Net Mineral Acres: 513.1598**



**Operators:** CAMINO, Continental, COTERRA, devon, eogresources, Ovintiv, PALOMA RESOURCES

**Counties:** Blaine, Canadian, Carter, Custer, Garvin, Grady, Kingfisher, McClain, Stephens

**MINERAL PACKAGE** - ELA Wild Turkey Mineral Package consists of approximately 513.1598 net mineral acres (NMA) located in Oklahoma's Anadarko Basin. The 513.1598 NMA's are spread throughout 36 sections in Blaine, Canadian, Carter, Custer, Garvin, Grady, Kingfisher, McClain, Stephens



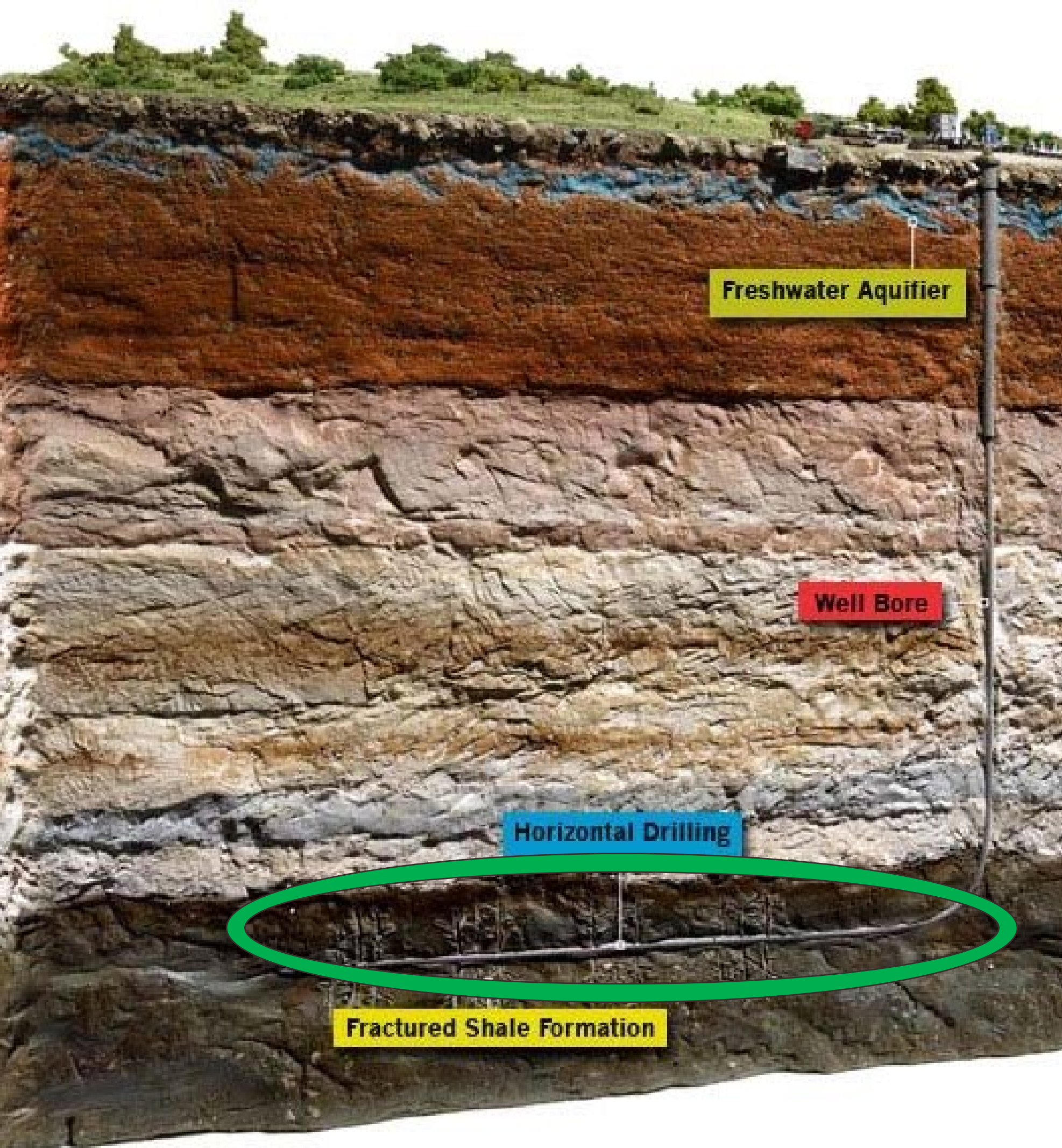


**Every oil & gas operator must lease the development rights from mineral rights holders before a single well is ever drilled on private land**



**These billion-dollar oil and gas operators are 100% responsible for all costs and liabilities. They must pay the minerals owners 1<sup>st</sup> and for 100% of the sale of all gas, oil, and natural resources produced under the minerals they leased.**





These shale basins are loaded with almost immeasurable quantities of oil and gas. The probability of economic success for wells drilled is greater than 95%. The reserves can be trapped in one reservoir up to over thirty reservoirs known to exist in each individual basin.

Today's technology allows between 6-12% economic recovery of reserves in place with advances every day in increased recovery as technology is perfected.

**MINERAL RIGHTS OWNERS DO NOT CARE HOW MANY WELLS ARE DRILLED, WHAT DEPTHS, WHAT METHODS, OR WHICH WELL IS BETTER THAN THE NEXT!**

**WE OWN IT ALL AND WANT ONLY THE VERY BEST OIL AND GAS COMPANIES EXTRACTING OUR MINERALS AS QUICKLY AND PRUDENTLY AS THEY CAN, WHAT WE GET IS ALL FOR FREE!**

# What Eckard Enterprises Offers

- ✓ Eckard provides a mixed portfolio of various mineral rights across different areas of desired mineral tracts, with different oil and gas operators, and for different economic and exploration reasons.
- ✓ A partner/investor allocates capital to own a portion of a given portfolio and owns fractional parts of all acres acquired and included in that portfolio.
- ✓ A purchase and sale agreement is offered and executed with an Exhibit outlining the real property details of every mineral acre included in the portfolio, as well as the fractional share acquired by a given partner/investor.
- ✓ The cash flow starts 180 days, or six-monthly production cycles, after the investment is made.
- ✓ Cash flow is every month after the first distribution for oil and gas sold 60-90 days prior to the distribution.
- ✓ There are 12 distributions and one 1099 at the end of the year.
- ✓ 100% passive in terms of cash flow, lack of expenses, and zero decisions to be made.
- ✓ Eckard Insight – the proprietary app offered by Eckard to its partners. It provides education and portfolio updates daily, as well as access to all deeds, records, portfolio details, and all revenue and tax statements.
- ✓ Eckard offers annual Eckard Partner's Conferences, field trips, Partner functions, full access to a wealth management team, senior managers, and direct access to the CEO – Troy W. Eckard.
- ✓ Primary areas of focus are the Anadarko basin in Oklahoma and the infamous Permian Basin in West Texas.

As of August 2023, average cash-on-cash returns are 16% + across all 84 portfolios





# Eckard's Discipline

- ❖ Do not lose one penny of invested funds
- ❖ Only acquire proven and cash-flowing minerals
- ❖ Only acquire minerals under the **“best in class”** operators
- ❖ Only acquire minerals with more than one reservoir of future potential development
- ❖ Only acquire minerals that will yield 10% cash returns annually over 5 years
- ❖ Only acquire minerals in pro-oil and gas states



**E C K A R D**  
E N T E R P R I S E S



# Other Advantages

- No UBIT or UDFI (Zero Debt)
- Monthly Checks
- Full Due Diligence
- No Risk of PT
- We do your FMVs
- Ability To Liquidate





It Is Your  
Decision to Cash  
In or Allow Your  
Minerals to  
Provide That  
Cash Flow!



# OFFER TODAY

- True Expertise, in the field of oil and gas
- Real Owner Ship, with a proven model
- Monthly Payments with a liquid status
- Set Up A Self-Directed IRA today and we will cover your fee
- Cover your Transaction Fee
- Take Advantage Today








# Schedule a Free Consultation Today!



**Derreck Long**  
*Senior Wealth Manager*

## CONTACT US

Reach out to learn more investing into Mineral Rights, and receiving Royalties for life.

 **832-840-1161 (Text Free IRA  
with your name and email)**

 **Dlong@EckardEnterprises.com**



## Let's Take A Poll

**How familiar are you with mineral rights and the oil & gas industry?**

**A:** Yes, I already have investments in oil & gas through my IRA.

**B:** No, but I'm curious to explore this investment option further.

**C:** No, and I have reservations about investing in oil & gas.

**D:** Not applicable - I do not have an IRA.

## Let's Take A Poll

**I'm interested in minerals investing because:**

**A:** I want passive income opportunities

**B:** I want real land ownership opportunities

**C:** I want to diversify my retirement portfolio

**D:** I want all the above

## Let's Take A Poll

**The biggest challenge I face when considering mineral rights investing is the:**

- A:** Uncertainty of commodity prices
- B:** Difficulty in finding profitable opportunities
- C:** Complex legal and regulatory landscape
- D:** Limited access to information and expertise
- E:** Other (participants can specify in chat)

## Let's Test What We've Learned

**True or False: The mineral rights owner is not liable for drilling, exploration, production, environmental, or any capital costs.**

**A: True**

**B: False**

# What's Next?



**New Webinar – *Preparing IRA Beneficiaries to Secure Your Legacy***

➔ Register today & join us December 13!



**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



## Tony Unkel

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## Derreck Long

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“

Learning gives CREATIVITY

Creativity leads to THINKING

Thinking provides KNOWLEDGE

Knowledge makes you **GREAT**

*- Abdul Kalam*

