

Choosing Your Self-Directed IRA Company

Know The Hands That Hold Your Future.



- When choosing a self-directed IRA company to manage your retirement funds, make sure to review the following key factors to ensure your future is in the proper hands.

ACCESS

How timely are their communications? Do you receive responses to calls or emails?

DISCLOSURE

Materials you receive or read online must assure you that the company does not sell products. If they do, this information must be fully disclosed in their materials. Unbiased self-directed IRA companies should not provide investment recommendation in any form.

EDUCATION

What educational opportunities are provided to help you achieve your financial goals? Are they free?

FDIC

Are your funds FDIC-insured? What programs are in place to protect your undirected funds?

EXPERIENCE

What's their experience with self-directed IRAs? How long have they been in business? What is their experience with your investment of choice?

FEES

Do you understand the fees? Are they fully disclosed? Are you offered options that suit your needs?

INSURANCE

How are they insured? What type and limit of coverage do they have?

INTERVIEW

Ask questions about credentials and history. Inability or refusal to answer may be a red flag.

KNOWLEDGEABLE

How well educated are the people handling your account on self-directed IRAs? What professional designations do they hold?

LOCATION

Where's the office? Take a visit or contact your state regulatory authorities to verify that operations are permitted.

REPUTATION

Check with your state securities regulators for any negative history. Complete a background search of the principals. Do a Better Business Bureau search and look for resolved and unresolved complaints.

SERVICE

Do they provide a designated point of contact or an 800 call center? Are you treated with the respect you expect?



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Entrust does not promote any investments. Rather, Entrust provides the administration, information, and tools to help make self-direction straight-forward and compliant. We help you get started quickly and stay with you every step of the way.