



# ROAD MAP TO RETIREMENT

At Preferred Trust Company we strive to break down the barriers of conventional thinking, offering Americans a fresh, common-sense approach to building retirement wealth. Our fiduciary role as a Self-Directed IRA custodian is to help you unlock the potential of your IRAs proper diversification through alternative investments in retirement portfolio.

## Our Advantages



**High Tech**



**High Touch**



**High Speed**

## Put Yourself in the Driver's Seat

With the passing of the Employee Retirement Income Security Act in 1974, the IRS gifted Americans the ability to generate **tax-deferred** or **tax-free** income through IRAs for their retirement planning. Self-directed IRAs allow **YOU** to take the wheel for **100% control**.

## Retirement Statistics

Less than

**50%**

Have calculated how much they need for retirement

**60%**

Do not participate in a defined contribution plan (such as a 401k)

**20**

years

Average time spent in retirement

**\$28**

trillion

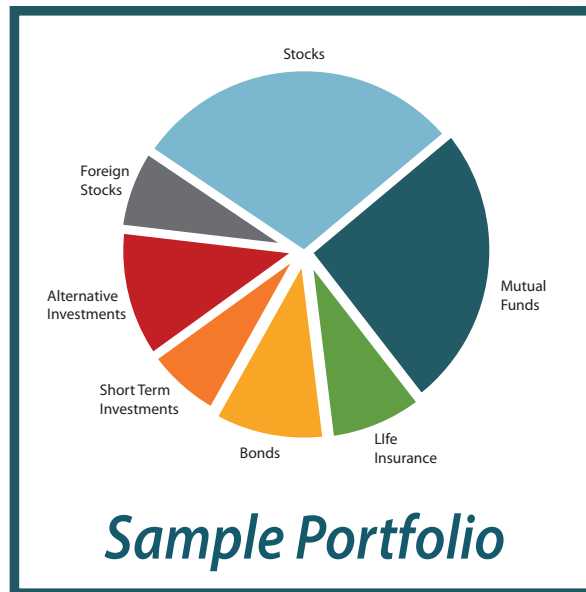
Value held in IRA accounts

**888.990.7892**

**PREFERREDTRUSTCOMPANY.COM**

# Diversify your Portfolio

The value of diversification is seen when you strategically spread money across different investments to reduce risk and counteract market corrections. The integration of alternative investments into a retirement portfolio unlocks **YOUR** ability to reap the rewards of compounded interest and tax-sheltered income. In essence, greater diversification can lead to higher returns over the long-haul.



# Plan your Journey

Planning for retirement is a long-term venture that thrives on long-term vision. Utilizing a self-directed IRAs effectively in your financial plan can help set you up for a successful journey. Did you know that you can invest in real estate with an IRA? In fact, real estate

is the most common investment Self-Directed IRA account holders look to for diversification. Other investments include precious metals, private placements, LLCs, energy, cryptocurrency and many more! The options are almost endless, with only two alternative investment exclusions: collectibles and life insurance. Getting started is easy! You can rollover a former employer 401k or established IRA to integrate investment types outside of the typical stocks, bonds and mutual funds.



← STOCKS & BONDS

ALTERNATIVE ASSETS →

← ANNUITIES

# Together we go Farther

A Preferred Trust Self-Directed IRA eliminates the uncertainty investors' experience when entrusting their retirement funds to others. As a regulated retail custodian, Preferred Trust facilitates the required IRS regulations to allow you to unlock qualified retirement funds for your direction towards greater returns.

**YOU** are empowered to select the account and investment vehicle best matched to **YOUR** needs. Align your strategies with others by investing with qualified persons; anyone NOT directly related to you applies.



## Self-Directed IRA Types

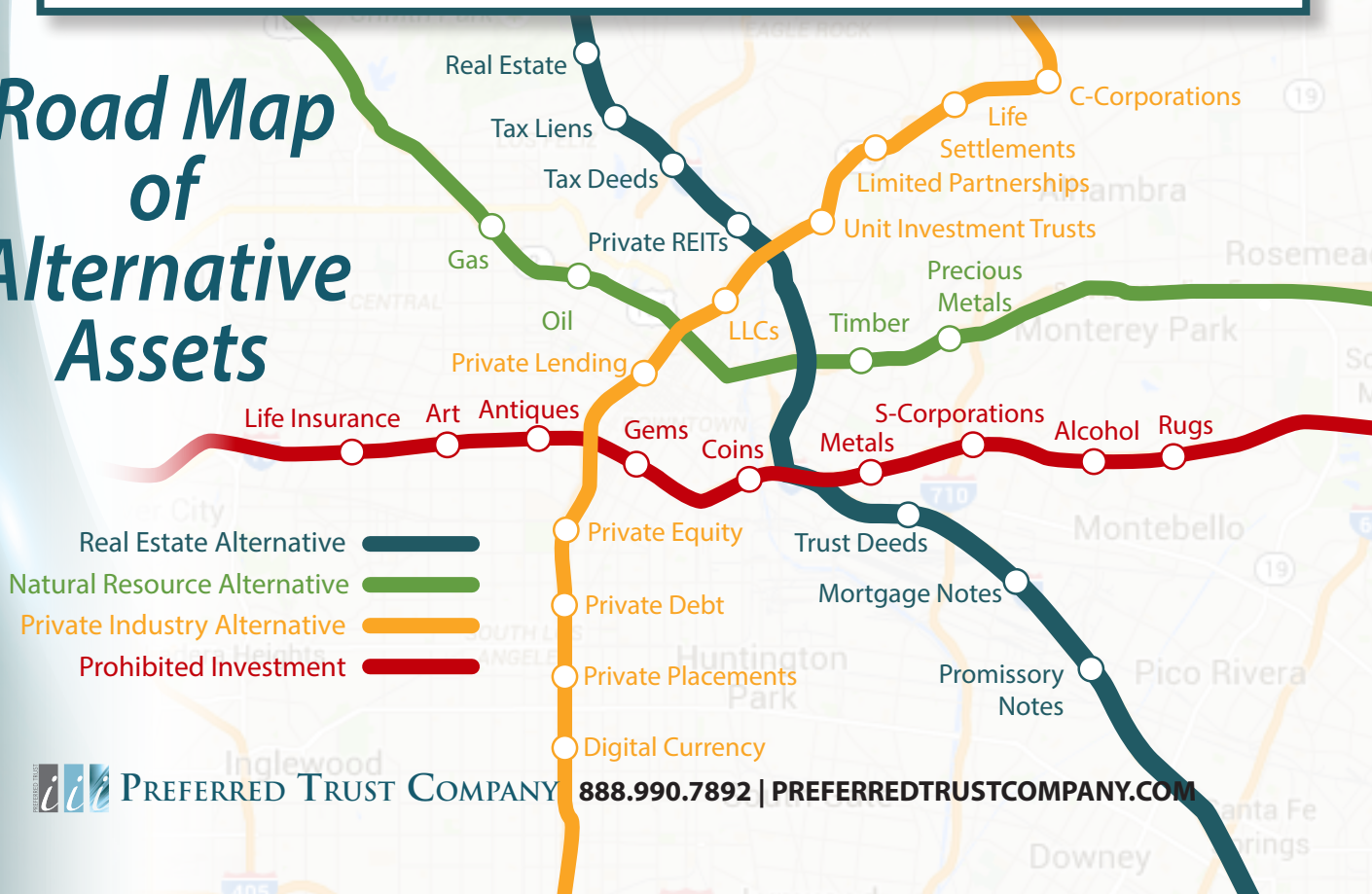
**Traditional IRA** Pre-tax income contributed and profits compound tax-deferred

**Roth IRA** After-tax income contributed and profits compound tax-free



**SEP** Simplified Employee Pension plans for business owners funding self and employees tax-deferred

**SIMPLE** Savings Incentive Match Plan for Small Businesses and the Employees

## Road Map of Alternative Assets



# 5 Steps to unlock your retirement potential

 <b>STEP 1</b> Go to preferredtrustcompany.com and identify us as your ideal custodian	 <b>STEP 2</b> Select the self-directed plan you prefer and complete an application online	 <b>STEP 3</b> Fund your self-directed IRA with a transfer of funds or contribution.	 <b>STEP 4</b> Select your investment. Choose from a wide range of alternative investments.	 <b>STEP 5</b> Grow your retirement account by controlling your investments.
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A \$50 one-time Establishment fee is charged plus an annual fee is assessed on the account value. Transaction processing fees vary by investment type.

## Commonly Asked Questions

### Q How long will it take to open an account?

A On average it takes approximately 2-3 weeks. The sooner we receive the completed forms, the sooner we can begin the rollover/transfer process. It may be possible to expedite the transfer from the outgoing custodian for an additional fee.

### Q Is a contribution the only way to fund my account?

A No, you can contribute up to \$6,000, if under 50 years or \$7,000 if over 50 years, per year. The easiest way to fund your new account is with a rollover or transfer from an existing IRA account or from a former employer's 401k plan. A custodian to custodian transfer/rollover is a non-taxable event. We will work with you and the other financial Institution to facilitate the transfer efficiently.

### Q What is the difference between qualified funds and non-qualified funds?

A Qualified funds are monies deposited into a retirement account prior to paying taxes on it (pre-tax). Non-qualified funds are monies you have available outside of a retirement plan for which you have already paid taxes.

## Our Team...



Business Development



Customer Service



Transfer Department



Investment Department




Accounting Department



# PREFERRED TRUST COMPANY

BUILDING WEALTH THROUGH INDIVIDUALIZED CONTROL

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