

The Directed IRA Update

Self-Direct Your IRA.
Invest In What You Know.
Take Control of Your Retirement™.



March 19, 2020

We're Open COVID-19 Update

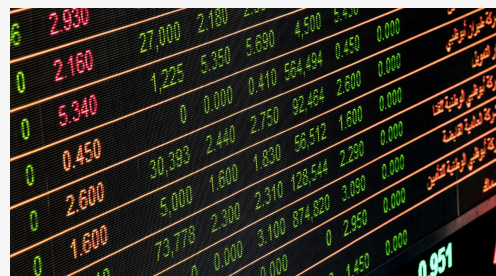


Directed IRA is open and can assist you with your account needs. We have some staff working remotely using secure systems and procedures and also have a small team still working in the office. We know many of you have transactions to be made, new accounts and contributions to fund, or maybe even need a distribution. Let us know how we can be of service. Our team is dedicated to being the number #1 company in our industry for customer service and we're ready to assist and provide that top level of service to you, our valued customer.

Dates & Deadlines

- **2019 IRA & Roth IRA Contributions:** These can be made until **April 15th, 2020**.
- **5500:** Solo K and Group plans are due **July 31st, 2020**.
- **990T:** For accounts subject to unrelated business income tax, returns are due **April 15th, 2020**.

Can My IRA/LLC Have a Brokerage Trading Account?



While most self-directed investors are using the IRA/LLC to invest in real estate or other non-publicly traded assets, there are many instances where an IRA/LLC owner would like to invest the cash from their IRA/LLC checking account into stocks or other publicly-traded investments.

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What is a



Backdoor Roth?

The Backdoor ROTH IRA is one of the greatest wealth building strategies. You may think you can't participate because you make too much money...think again. What is it? What's it all about and should

Upcoming Events

Live event moved to **September 25th - 26th, 2020**. The virtual event will still be held on **April 17th - 18th, 2020**.

Learn more at www.sdirasummit.com

- April 17th - 18th, 2020
VIRTUAL ONLY
- September 25th - 26th, 2020
Scottsdale, AZ

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2019 Tax Reporting for Your Self-Directed IRA



Self-Directed IRA investors must be aware of their self-directed IRA tax reporting responsibilities. Some of these items are completed by your IRA custodian and others are the IRA owner's sole responsibility.

Here's a quick summary of what should be reported to the IRS each year for your self-directed IRA. Make sure you know how these items are coordinated on your account as the ultimate authority and responsible tax person on the account is, you, the account owner.

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Send a Copy of Mat's Book for Free to Your Friends & Family by Visiting www.directedira.com/referafriend



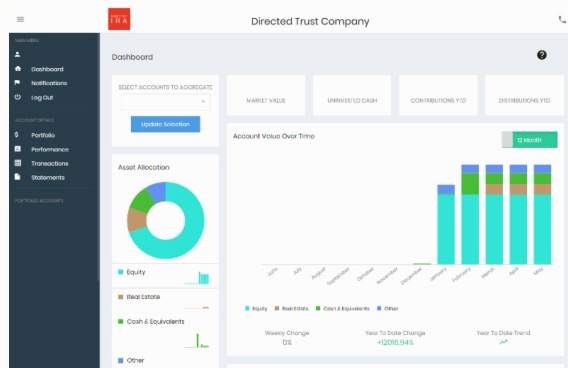
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WE'LL CALL THEM



CHOOSE YOUR GIFT



Access Your Directed IRA Online Account Portal

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