

The Directed IRA Update

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

DIRECTED
I R A

February 27th, 2020

Dates & Deadlines

- **2019 IRA & Roth IRA Contributions:** These can be made until **April 15th, 2020**.
- **FMV:** Fair market valuation FINAL DEADLINE is **March 1st, 2020** for any assets that are held by your IRA account.
- **990T:** For accounts subject to unrelated business income tax, returns are due **April 15th, 2020**.

Upcoming Events

- **April 17th - 18th, 2020**
ATTEND LIVE OR VIRTUAL
Portales Theater - Scottsdale, AZ



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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The Hidden Power and Benefits of a College Education IRA

The little known fact that can transform your college savings account/Coverdell ESA/Education IRA into a powerhouse for college savings is the fact you can self-direct the investments. Hence, you can use leverage and sometimes make a

Were taking it up a notch for the 2020 SDIRA Summit by adding more **advanced classes and case studies!**

There will be a couple closed door sessions for *live attendees only* with some of our most successful self-directed investors and we will have two different class options running throughout most of the Summit.

We will be at the **Portales Theater Scottsdale April 17th & 18th**; if you can't make it live you can still attend virtually and receive a recording of all sessions (except closed door).

Event Agenda:

- Friday, April 17th from 2:00 PM - 5:30 PM.
 - Welcome & Networking Reception for all attendees at The Hotel Adeline from 5:30pm-6:30pm.
- Saturday, April 18th from 8:30 AM - 4:00 PM. *Lunch will be provided for all attendees.*
 - If you have selected the VIP option this will take place from 6:00-9:00 pm at Top Golf, located at 9500 Talking Stick Way, Scottsdale, AZ 85256.

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small investment that can pay enormous returns and in turn accelerate your college savings account very quickly.

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Investing in Real Estate with Your IRA? Check out our CEO Mat Sorensen's video

In this video, our CEO Mat Sorensen breaks down 5 critical tips when considering investing in real estate with your IRA.

Learn about prohibited transactions, UBIT tax, self-directed IRA accounts, investment management and most importantly the dos and don'ts when self-directing your IRA.

[Watch Here](#)

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



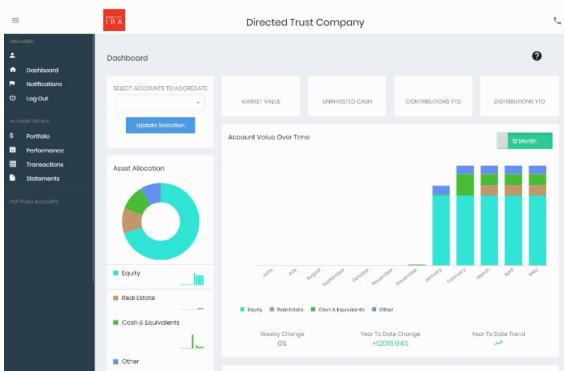
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WE'LL CALL THEM



CHOOSE YOUR GIFT



Access Your Directed IRA Online Account Portal

- View Incoming Transfers, Investments, Payments, and Activity.
- View and Download Your Quarterly Statements.

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