



We are experts in self directed IRA and 401k setup, investing and account administration. Our staff is trained and experienced in all aspects of self directed investing strategies, structures, and rules. We offer our expert products and services in a very low cost, simple and efficient manner. Our offerings and services are unmatched in the industry.

We provide self directed ira, 401k administration products and services to individuals looking to invest their retirement accounts in non-traditional investments. We pride ourselves in expertise, low costs and quick service for self directed IRAs.

Primary Products and Services

- Self Directed IRA administration
- Self Directed 401k Plan setup
- Check Book Control IRA-LLC (ICO)
- Small Business Financing with 401k



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BENEFITS SERVICES

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Self Direction Puts YOU In Control!

A Self Directed IRA, like other traditional IRAs, follows the same tax laws and rules. The typical IRA usually limits you to the investments that your investment advisor or broker allows. Such investments are generally limited stocks, bonds, mutual funds or other Wall Street types of investments. However, a Self Directed IRA allows you to invest in non-traditional investments of your choosing.

These investment choices can be private LLCs, or corporations, private lending, real estate, precious metal and much more. The options and choices are only limited to your imagination and the tax code.



Why Self Direction?

Most traditional IRAs and 401(k)s are limited to investing in traditional investments such as mutual funds.

However, there are many other viable investment choices and options that are not available through these traditional means.

Real Estate

Many times real estate investment opportunities present themselves, yet your main source of capital is locked up in a traditional retirement account. Creating an ICO enables you to take control and capitalize on real estate investment opportunities that present themselves.

Other Investments

A Self Directed IRA will allow you to invest and hold almost any type of asset. Such investment could be private placements, foreign real estate, gold, silver and other commodities, oil and gas, and many others.

How It Works

1. Accuplan will consult with you to determine what your objectives are for self direction.
2. We will create a new IRA account and a separate LLC with American Estate & Trust.
3. You roll-over your IRA or 401(k) to American Estate & Trust.
4. You establish banking and investment accounts for the LLC.
5. American Estate & Trust buys membership in the LLC.
6. You direct the investments as the LLC Manager.

What is Included?

- Setup of LLC
- Filing of state articles
- Self Directed IRA compliant operating agreement
- Setup and operating guide
- Banking authorizations for checking account
- Handling your rollover to our sister company American Estate & Trust, the IRA custodian
- Unlimited consulting

Strategies For the ICOSM

- Purchase real estate (foreign and domestic)
- Loan to others (Note: There are some restrictions and rules for this type of transaction)
- Buy into a business (Note: There are some restrictions and rules for this type of transaction)
- Use purchase options on real estate
- Flip properties
- Purchase commodities (gold, oil & gas, others)
- Invest in private offerings or thinly traded stocks
- Hard money lending

Benefits of the ICOSM

- Direct Ownership in non-traditional investments
- Capital gains deferral or elimination
- Checkbook control of all plan assets and monies
- Low custodian or annual account fees
- Income and tax deferral for growth on investments

Why Accuplan Benefits Services?

- Low custodial fees
- Flat annual fee
- Online account access
- Account event messaging
- 24-48 Hour Processing Times
- Expertly trained customer support

For more information visit www.accuplan.net