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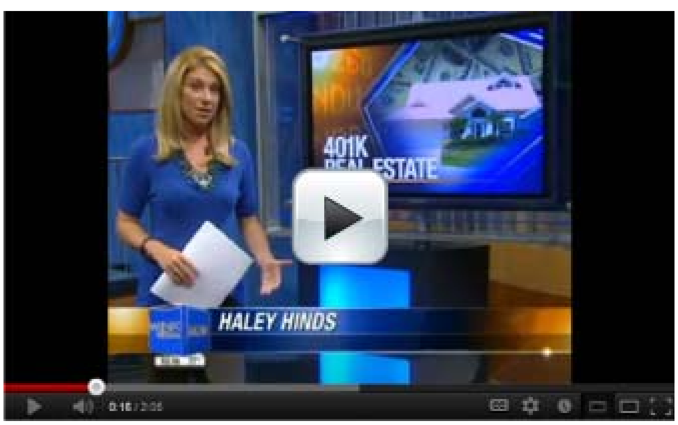
IRA Intelligence

IRA Financial Group

June 2012

Welcome to our e-newsletter's summer issue

IRA Financial Group Attorney Adam Bergman Featured on CBS-affiliate in Fort Myers, Fla.



Last month, IRA Financial Group tax attorney Adam Bergman appeared on CBS News affiliate WINK-TV in Fort Myers, Fla. to discuss using retirement funds to purchase real estate.

Read the online text version

7/31

Solo 401(k) Tax Deadline Reminder

For Solo 401(k) Plans, IRS Form 5500-EZ must be filed by July 31, 2012. File the Form 5500-EZ at the following address:
Department of the Treasury
Internal Revenue Service
Ogden, UT 84201-0020

IRA financial group

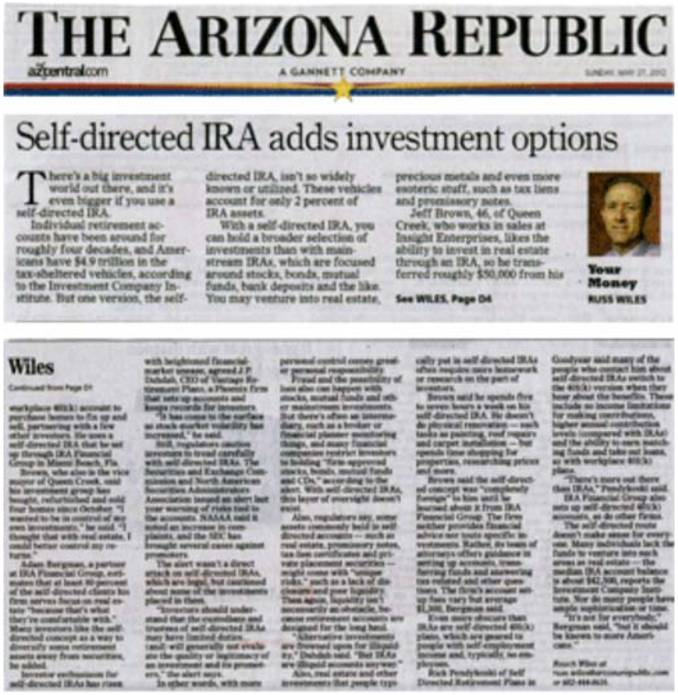
IRA Financial Group, LLC was founded by a group of top law firm tax and ERISA lawyers who have worked at some of the largest law firms in the United States, such as White & Case LLP and Dewey & LeBoeuf LLP.

www.irafinancialgroup.com

New Intiative Protects Clients from IRS Attack

Our in-house tax attorneys have spent

Bergman & IRA Financial Client Quoted in The Arizona Republic



THE ARIZONA REPUBLIC

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Self-directed IRA adds investment options

There's a big investment world out there, and it's even bigger if you use a self-directed IRA.

Individual retirement accounts have been around for roughly four decades, and Americans have $4.9 trillion in the tax-sheltered vehicles, according to the Investment Company Institute. But one version, the self-directed IRA, isn't so widely known or utilized. These vehicles account for only 2 percent of IRA assets.

With a self-directed IRA, you can hold a broader selection of investments than with mainstream IRAs, which are focused around stocks, bonds, mutual funds, bank deposits and the like. You may venture into real estate, precious metals and even more esoteric stuff, such as tax liens and promissory notes.

Jeff Brown, 46, of Queen Creek, who works in sales at Insight Enterprises, likes the ability to invest in real estate through an IRA, so he transferred roughly $50,000 from his

See WILES, Page D4

Your Money

RUSS WILES

Wiles

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IRA Financial Group Introduces Free Online Solo 401(k) Contribution Calculator Tool

The online solo 401(k) contribution calculator is a valuable tool that allows an individual to calculate the maximum annual contribution to a solo 401(k) plan, also known as an individual 401(k) plan or self-directed 401(k) plan. The free online contribution calculator tool allows investors to calculate the maximum contribution based on one's age as the type of entity they have (i.e. sole proprietorship, LLC, partnership or corporation).

provided free to all IRA Financial Group self-directed IRA clients in order to better educate them about self-directed IRA and prohibited transaction rules. We take great pride in the fact that each client is assigned a tax attorney in order to help review IRS IRA regulations.

We believe it is vital that each of our clients have a solid understanding of all the IRS rules before making an investment. This initiative furthers our commitment to protect you against violating IRS rules, engaging in a prohibited transaction and making a potentially fraudulent transaction.

Referral Program

IRA Financial Group currently seeks referrals from financial advisors and brokers with clients interested in diversifying their retirement portfolio with alternative investments.

For more information contact Stacy Sanders at 800-IRA-0646 (Ext. 38) or Staceys@irafinancialgroup.com.

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