



Career Path: IRA Financial Group's Adam Bergman

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FINANCE

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Seasoned tax attorney Adam Bergman had a front row seat to the dissolution of two major New York law firms during the 2008 crash. At a crossroads in his career, Bergman was contemplating whether accepting a gig at another law firm was the right thing to do when a unique opportunity popped up. A contact reached out to hammer out the legal details of a self-directed IRA investment.



Bergman went on to found IRA Financial Group to help investors turn their retirement accounts into more profitable endeavors through various investments, from real estate to venture capital funding. The company focuses on providing guidance to self-directed retirement investors, without getting too involved. Here, Bergman talks to Crain's Miami about why he's been successful in an increasingly crowded market.

Know your place:

We don't market investments. We want people to be successful, but we don't tell people where to invest. Our clients come to us and say, "OK, this is what I want to do. I want to invest in this hedge fund or lend money to him or her or buy this piece of real estate. Set me up and do the investment for me."

Keep your eyes peeled:

This opportunity kind of came out of nowhere so to speak. A client needed a tax attorney to help kind of navigate all the rules and put everything together for a self-directed retirement account. It's a lesson that there are opportunities that present themselves, and an opportunity is only good if you let it happen. So be open-minded. It doesn't cost anything to sit down and talk to someone.

Understand your customer...

Consumers are smarter. The internet has leveled the playing field, and consumers know what everyone is charging. They're smart. They can do research, which is great because they come to you with very good questions. You don't have to do a lot of explaining because they're very educated.

...And know they're always right

If the client is not happy, I'm not charging the client. I will lose money, but I want to make the client happy and I think a lot of businesses are too focused on immediate results. "You're not happy? No problem. Don't pay me." And you know what's happened? That client has ended up sending me friends or family members because they really respect that we stepped up to the plate.

Follow IRA Financial Group on Twitter at [@IRAFG](https://twitter.com/IRAFG).

Photo courtesy of Adam Bergman



December 7, 2016 - 2:40pm



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