ADAM BERGMAN, ESQ.

Adam Bergman is a partner with the IRA Financial Group, LLC—the market's leading provider of Self-Directed IRA LLC and Solo 401(k) Plans—and the President of IRA Financial Trust Company, a Self-Directed IRA custodian. In addition, Mr. Bergman is a recognized expert on IRAs and 401(k) plans. He's the author of 7 books on self-directed IRAs and has advised over 15,500 clients on a wide range of tax and ERISA matters involving limited liability companies and retirement plans.

Mr. Bergman is a frequent contributor to Forbes.com on various topics involving retirement accounts, including the taxation of cryptocurrencies, and is a member of the Forbes Finance Council. He has also been quoted in over one hundred and thirty major news publications on the area of self-directed retirement plans. Mr. Bergman has been interviewed on CBS News and has been quoted in many top publications, among them Businessweek, CNN Money, Forbes, Bloomberg, USA Today, and American Lawyer in the area of retirement tax planning.

Prior to joining the IRA Financial Group, LLC, Mr. Bergman worked as a tax and ERISA attorney at White & Case LLP, Dewey LeBoeuf LLP, and Thelen LLP, three of the most prominent corporate law firms in the world. He received his B.A. (with distinction) from McGill University and his law degree (cum laude) from Syracuse University College of Law. He then went on to receive his Masters of Taxation (LL.M.) from New York University School of Law.

Mr. Bergman is recognized as a leading retirement tax-planning expert and has lectured attorneys on the legal and tax aspects of Self-Directed IRA LLC and Solo 401(k) Plans. Mr. Bergman a member of the Tax Division of the American Bar Association and New York State Bar Association.

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