

# Preferred Trust

## Your Bridge to Diversify Client Portfolios with a Self-Directed IRA

As you evaluate strategies to broaden your clients' investment portfolios, understanding the importance of offering diversified opportunities within the realm of alternative assets, consider Preferred Trust. We offer a bridge to the world of alternatives, facilitating the seamless integration of an SD IRA for your clients' qualified funds.

### Here's what we offer:



#### Retain Control & Accessibility

- Maintain complete control and oversight of your clients' accounts within our online portal.
- Access account information securely, enabling you to manage funds and investments.
- Alternative investments are considered a part of the clients portfolio of assets under management.
- Ensure automatic payments continue without disruption, offering a hassle-free experience for both you and your clients.



#### No Client Poaching or Marketing

- We strictly uphold the integrity of your client relationships, refraining from solicitation or marketing efforts.
- Our focus is purely on providing a vehicle for diversification, respecting the existing rapport you've built with your clients.



#### Empowering Diversification

- Explore a wide array of investment opportunities beyond traditional assets.
- Integrate alternative investments to potentially enhance portfolio resilience and growth.
- Empower clients to diversify their portfolios, improving risk management and potential returns.



#### Partnering for Success

- We're more than a service provider; we're a dedicated partner in your clients' financial journey.
- Offering guidance and support to ensure a smooth transition into self-directed IRAs.
- Equipping you and your clients with the tools and resources necessary for successful alternative asset diversification.

We invite you to explore the possibilities with us and see how our self-directed IRAs can complement your existing strategies, adding a new dimension to your clients' investment options. Our commitment is to facilitate the expansion of investment horizons without intruding upon your established relationships.



**PREFERRED TRUST**

ClientService@ptcemail.com  
888-990-7892

[www.PreferredTrustCompany.com](http://www.PreferredTrustCompany.com)