



MADISON
TRUST COMPANY

AN INTRODUCTION TO SELF-DIRECTED IRAS

What is a Self-Directed IRA?

A Self-Directed IRA is a type of retirement account that allows you to invest in alternative assets.

- ✓ Must be held by a regulated custodian
- ✓ Works like a standard IRA, but you have much greater asset choice
- ✓ Gives you the ability to diversify beyond Wall Street
- ✓ Has a very simple 3-step set up process

***Exceptional Service.
Exciting Opportunities.***



What are the benefits of a Self-Directed IRA?



Benefits:

- ✓ With a Self-Directed IRA, you can expand beyond the Wall Street assets and invest in real estate, private placements, and more.
- ✓ You can experience more hands-on investing by investing in what makes sense to you personally.
- ✓ Hedge against the volatile stock market and invest in investments that have a steadier and more reliable revenue stream.

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Exciting Opportunities.*

? What Can You Invest In?

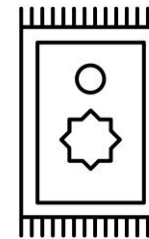
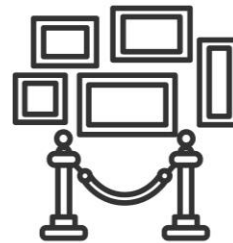
- Self-Directed IRA investment options include pretty much everything.



? What Can't You Invest In?

- There are only a few assets that you cannot invest in:

- Life Insurance
- Collectibles (such as artwork, rugs, antiques, etc.)
- S-Corporation Stock



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The Madison Advantage



Incredible Client Support

Madison Trust was created with one goal: to give retirement investors an amazing financial experience. Our service-based model is designed so your investors always speak to a live and knowledgeable representative.



Straightforward Fees

Madison Trust's flat rates are amongst the lowest in the industry; we never charge asset-based holding fees. Fund Managers and Investment Sponsors alike have come to rely on us to seamlessly channel their investors' IRA money into their fund.



Industry Knowledge

Madison Trust Specialists complete rigorous CISP training and have a deep understanding of a variety of alternative asset classes. Our Specialists are equipped to field any questions your investors may have about their Self-Directed IRA.



Assets
Under Custody:

\$4.0B+



Client
Retention Rate

95%



Client
Testimonials

2,000+



Clients
in All

50 States



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What questions do
you have about
Self-Directed IRAs?



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