

## **Realtor Toolkit: Sell more Real Estate to your clients with an *Entrust Real Estate IRA***

**Mailing** – Develop a well crafted letter, postcard or email campaign that will communicate valuable information about IRA investing to your sophisticated investor clients.

**Process:** (See Attached Templates)

1. Attached you will find a flyer that we can modify and send to you to forward to your clients.
2. Attached two articles that you can mail to your clients or include in your next email blast.
3. Postcards – We can provide you with the artwork and you can modify the back of the postcard to include your information
4. Draft your own letter and we will provide tri-fold brochures for you to include in the envelope
- 5.

**Payoff:** Increased education leads to transactions with investors. This is a cost-effective way to communicate new information to your clients.

**Event Planning** – Sponsor a lunch or evening event to educate your clients and prospects on how they can use their IRA to invest in real estate.

**Process:**

1. Select a date and location for your event, and contact Entrust SWFL to arrange for a speaker. (Please call 30 days prior to the event)
2. Send invitations or email at least 21 days prior to the event
3. Establish a process to handle the RSVPs
4. Organize the event and necessary tasks with the venue and coordinate with the speaker.
5. Send a reminder email a few days before the event.
6. Entrust SWFL will bring all educational materials, and speak for 30-60 minutes.

**Web Marketing** – Add a new educational component to your website: “Buy Real Estate in Your IRA.” This can include the key components of using one’s IRA to purchase real estate. If further information is needed they can be redirected to [www.entrustswfl.com](http://www.entrustswfl.com)

**Process:**

1. Contact your website designer and ask them add a page and Entrust SWFL will provide the content
2. Link - Ask Entrust SWFL to add you to our website as a “Friend” we will do a customized page on our site with your picture and contact information

**Payoff:** Your website can sell 24/7, long after your workday has ended. This has the potential to reach investors all across the country. This will allow you to harness the power of the web to differentiate yourself from everyone else in the real estate industry, and drive business to you.

# Articles for your Email Blast, Newsletter, Mailing or Websites

**Article 1** - Opportunities abound in a slow market. Buyers do have the upper hand. Florida is going through a transition in their real estate market. It appears some substantial property tax reform is around the corner. This region is projecting huge growth over the next 10, 20, even 30 years. The state of Florida is expected to nearly double in size over the next 25 years. In times of decline, many investors see times of decline as a real estate investment opportunity.

***Did you know that you can purchase investment real estate with their retirement funds?*** Did you know you can fund a mortgage with your IRA account and all the interest is tax free? It is estimated there is approximately 4 trillion dollars in IRA accounts and most investors are unaware that they can use these funds to buy real estate as an investment. Self Direction is the ultimate way to diversify your portfolio.

Just like any other asset that may be held in a retirement account, real estate and other non-traditional assets grow tax-free. All assets inside a retirement account are not subject to capital gains. When the asset is sold, all proceeds go back to the IRA or 401(k) without being subject to taxation. You may not have heard of this because not all custodians offer this service. The IRS states "IRA law does not prohibit investing in real estate, but trustees are not required to offer real estate as an option." These plans are most commonly called **self-directed retirement plans**. Self-directed retirement plans allow investors a broader scope of investment choices including Real Estate, notes and private LLCs.

Self-directed IRA's are not complicated nor are they expensive. Self-directed retirement accounts are reasonable and easy to do, and they give you one more tool to participate in our area's real-estate market. 1031 Tax Free Strategies is the Southwest Florida franchisee for the Entrust Group. Entrust is the leader in providing self-directed retirement plans in United States. 1031 Tax Free Strategies has helped hundreds of investors diversify their retirement plans by adding real estate and other non-traditional assets. If you are interested in learning more about owning real estate inside an IRA, please visit their website at [www.entrustswfl.com](http://www.entrustswfl.com) or call them at 239-333-1031.

**Article 2** - *Did you know that you can purchase investment real estate with their retirement funds?* Did you know you can fund a mortgage with your IRA account and all the interest is tax free? Self Direction is the ultimate way to diversify your portfolio. Now is the ideal time to purchase real estate in Southwest Florida.

Prices have not been this lower in years and interest rates continue to decline to near record levels.

I have partnered up with Entrust SWFL to promote purchasing real estate through your IRA. If you are looking for a great investment, please contact me to help you find the next great piece of investment real estate.

If you would like more information, please call myself or Entrust SWFL at 239-333-1031. Catch the wave of Tax Free Investing with a Self-Directed IRA.

# Special Opportunity for My Clients

Did you know? Although recent descriptions by the U.S. Federal Reserve of the slumping housing market continue to remain bleak, there still is a bright spot within in the real estate market, that only a select few are aware of. The most promising, untapped source of funds for real estate investments is the \$4.2 trillion dollar Individual Retirement Account (IRA) sector. Since more than half the nation's wealth is STILL invested in real estate the question many financial insiders are beginning to ask is, "Why isn't your IRA invested in Real Estate?" The answer while seemingly obvious is that most real estate professionals, CPAs, lawyers, financial planners, and especially the general public don't know that IRA's can be invested in real estate.

"Learning to invest IRA funds into real estate may be the most important decision real estate professionals make this year," - Dave Owens, CPA and Managing Member Entrust SWFL, "By using IRA funds to invest in real estate, you're taking advantage of the tax breaks, a buyer's market, and the abundance of available property."

*This opportunity presented to you by*

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"Please call and let me show you some great investment properties that are available to purchase through your IRA"



Joe T. Realtor(your picture here)

Several Factors are lining up to make SWFL Real Estate a great value again—

- **Dropping Price**
- **Interest Rates near historic lows**
- **Insurance rate decreases**
- **Property Tax Reform**

Everyone is looking for opportunities with their retirement dollars. Why not invest in solid assets? Current opportunities include:

- **Land** (i.e. Lots)
- **Rentals** (i.e. Houses and Condominium or Commercial)
- **Lending Money** (i.e. Lend money to investors or friends for investment and get much higher returns versus CDs with a mortgage for security)
- **LLC and Private Placements** (i.e. Join a group of private investors and purchase real estate at these low prices, or purchase private investments like a large commercial property)

**Entrust**  
swflorida

Call Entrust SWFL for more information on Self-Directed IRAs and how to take full advantage of this opportunity at 239.333-1031 or check our website at [www.entrustswfl.com](http://www.entrustswfl.com)