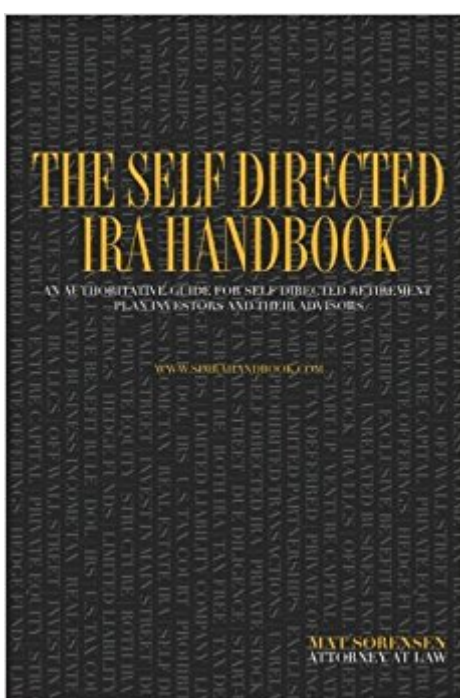


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# The Self Directed IRA Handbook: An Authoritative Guide For Self Directed Retirement Plan Investors And Their Advisors



## Synopsis

The Self Directed IRA Handbook explains how investors can own alternative retirement plan assets in their IRAs. These assets typically include; real estate, private stock, IRA/LLCs, LP, LLC, private equity, hedge funds, private placement, crowdfunding, and precious metals. The Handbook clearly explains the prohibited transaction rules, investment structures, common self directed IRA investment assets, and SDIRA tax pitfalls (UBIT & UDFI tax). The Handbook goes beyond the basics of self directed IRAs and includes extensive FAQs after each chapter, and nearly 100 citations to cases, statutes, rulings, and opinions from the Courts, the IRS, and the DOL. Its author, Mat Sorensen, is an experienced attorney who has advised clients with IRAs at every major self directed IRA custodian, and who speaks frequently at industry associations and before professional groups on self directed IRA topics. Mat regularly advises clients on the prohibited transaction rules, on IRA/LLC structures, on real estate and private company investments, and on UBIT and UDFI taxes. Mat has also successfully represented self directed IRA owners before the IRS Appeals Office and the U.S. Tax Court. To view testimonials for the book, and for additional self directed IRA resources, please visit the author's site at [www.sdirahandbook.com](http://www.sdirahandbook.com)

## Book Information

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## Customer Reviews

Mat Sorensen is a lawyer and the author of *The Self Directed IRA Handbook: An Authoritative Guide for Self Directed Retirement Plan Investors and Their Advisors*. Mat's legal practice has a particular emphasis on self directed retirement plan law. Mat has advised over a thousand clients with self directed retirement plan investments, and has established IRA/LLCs, partnerships, private offerings, corporations, and other investment structures with self directed IRAs and 401(k)s.

In addition to account owners, his clients have included trust companies, financial institutions, insurance companies, hedge funds, investment sponsors, and third party administrators. Mat regularly consults self directed IRA owners on IRC 4975 and the prohibited transaction rules, on UBIT and UDFI taxes, and has represented self directed IRA owners before the IRS Appeals Office and the U.S. Tax Court. Mat also serves as an instructor for the Retirement Industry Trust Association's (RITA) Self Directed IRA Professional certification program. RITA is the premier national association representing the self directed retirement plan industry. In addition to Mat's self directed retirement plan practice, he has litigated in federal and state Courts in Arizona, Utah and California, has assisted dozens of clients in raising capital through private offerings, has advised over a thousand clients in business formations and estate planning, and has helped clients buy/sell numerous multi-million dollar businesses. His website is [www.sdirahandbook.com](http://www.sdirahandbook.com).

Great SDIRA book - had everything you need - he had great case examples and highlighted important notes to remind/reflect upon as this is pretty complicated. I'm adding onto this review as I purchased another SDIRA book - Real Estate Investment Using Self-Directed IRAs - 2015 Edition: A Guide for the Real Estate Savvy Entrepreneur Paperback - March 18, 2015 which was twice the price pretty much and was a disappointment on arrival as it was soooo small. I haven't read it yet, but I will. I do not believe from what I glanced in this book that it would compare to Mr Sorensen's book if you are interest in SDIRA's. I'll be reviewing that book after I get over the disappointment of it at 1st glance. This book is the best for the subject!

It is all here. The laws making the self-directed IRA possible are difficult to understand and are written in what Not to do. Mat shows us How-To and lays it all out in a very clear format that is easy to read through and use as a reference.

This is a phenomenal book! Mat does a tremendous job of explaining everything you need to know about self directed IRAs. To help the reader digest the abundance of information, he includes a list of FAQ and answers at the end of chapters to help reinforce what was just covered. This is a must read for anyone considering investing some of their existing IRA into real estate.

This book covers the extensive topic of taking charge of your investment portfolio, specifically the retirement package without resorting to buying a ton of "penny stocks" to earn gobs of money. This

book lays down the structure and foundation for building a solo retirement package that may be in addition to traditional investment approaches. It highlights the tax traps and pitfalls, plus the do's and the don'ts of buying and selling.

Conversational. Thorough. Well-illustrated with understandable examples. The area of self-director IRAs is a bristling land mine of financial dangers without a map. This is your map.

This is a great reference tool for SDIRA investors. Thorough, with detailed explanations and examples. One topic it does not address is the practice of checkbook control. Chapter 3 would seem to be the logical place to discuss this if not a dedicated chapter. Otherwise, no complaints.

This book was really an eye opener. I've always been interested in the idea of self directing my retirement plan, but there never seemed to be any single source I could go to to get the straightforward and unbiased answers I was looking for. That is no longer the case. Mr. Sorensen has brought all of the information together in one concise, well-written reference guide. I know I will be referring to this book again and again as I begin taking control of my retirement!

Until I ordered this book I never knew about these other IRA's and retirement strategies. This book has inspired me to transfer my Roth IRA into real estate which if I knew could be done I would have done a long time ago. I'm excited to start applying Mat's teachings to my own retirement.

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