

Formerly known as First Trust Company of Onaga

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# Private Placement Investments in IRA

Make IRAs the Focus of Your Product Launch or Lending Offering

Mainstar Trust works with many non-publicly traded investment products such as: Private Equity Funds, Private Funds, Limited Partnerships and Limited Liability Corporations. At Mainstar Trust we are IRA experts, who can help you grow your business by offering IRA's to your investors.

There are currently:

- \$7.8 trillion in IRA assets
- \$17.2 trillion in defined contribution/benefit plans that will eventually be eligible for rollover in IRA's

IRA asset values will continue to grow rapidly as investors rollover money from defined contribution/ benefit plans into IRAs. As investors move their savings from work place retirement plans to IRAs, they will look to diversify some of their monies into alternative investment products.

**Step 1 - Create a Private Placement Fund Appropriate for IRA Investors**

Work with your attorney to ensure that your product Operating Agreement has appropriate language for IRA investors: including

**1-800-521-9897**

## Questions?

[Contact Mainstar Trust \(/Contact\)](#)  
[FAQs \(/Faq\)](#)

## Getting Started

[Self-Directed IRA \(/self-directed-ira\)](#)  
[Account Options \(/account-options\)](#)  
[Asset Types \(/asset-types\)](#)  
[New Account Application \(/Log-in-Sign-Up\)](#)

## Resources

[News & Updates \(/news-and-updates\)](#)  
[Investor Education \(/investor-education\)](#)  
[FAQs \(/Faq\)](#)

suitability statement, leverage and tax implications, prohibited transactions, disqualified persons, administrative responsibilities and plan asset rules.

Step 2- Want to Add Your New Product to the Mainstar Trust Platform? Complete the Asset Information Worksheet found here

(<https://www.mainstartrust.com/upload/files/2015/12/asset-information-worksheetpdf1450830790.pdf>).

Email us the following applicable product documents here (<mailto:assets@mainstartrust.com>) for administrative review:

- Completed Asset Information Worksheet
- Articles of Incorporation or Organization
- Prospectus, Operating Agreement, By-Laws or Private Placement Memorandum
- Partnership Agreement and/or Subscription Documents
- Sample Copy of a Confirmation or Certificate

Step 3 - Consult Advisors, Attorneys or Tax Professional

We encourage you to consult with professional advisors to ensure that you understand tax, legal or investment issues related to the use of IRA funds in Private Placement Products. Please refer to IRS 590, 598, UBIT IRC 4975, Prohibited Transactions and DOL Plan Asset Rules.

## ABOUT MAINSTAR TRUST

- Trusted, self-directed retirement custodian for nearly 40 years
- Personalized customer service
- Specialist on Alternative product types

1-800-521-9897 | [customerservice@mainstartrust.com](mailto:customerservice@mainstartrust.com)

