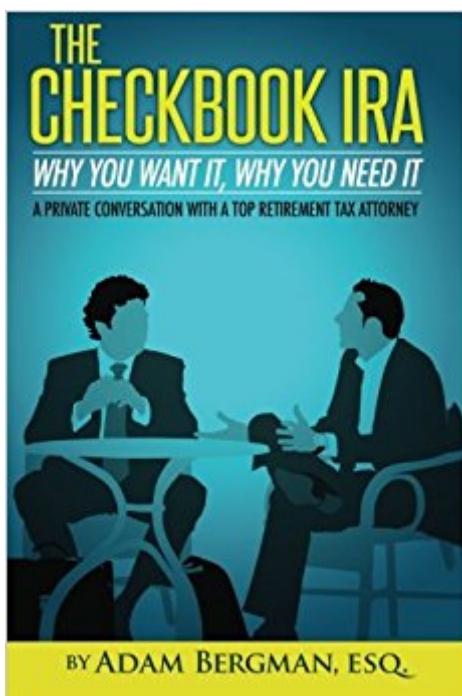


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# The Checkbook IRA - Why You Want It, Why You Need It: A Private Conversation With A Top Retirement Tax Attorney (Self-Directed Retirement Plans) (Volume 2)



## Synopsis

Unlock a world of investment opportunities and take control of your retirement future with the Checkbook IRA. The financial industry wants you to think you're limited to stocks, mutual funds, and other such instruments offered by the big institutions, but the truth is, there's a whole world of possible alternative investments—from real estate to precious metals, from private equity funds to tax liens—and with a Checkbook IRA, you can take charge of growing your own wealth, invest in what you know, and understand all from the comfort of a local bank account. The Checkbook IRA, written by tax attorney Adam Bergman, reads like an easy-to-understand conversation between a lawyer and his client, addressing the most popular issues facing a self-directed IRA investor, with a special focus on the Checkbook IRA. This comprehensive guide covers everything—from the basic principles of a self-directed IRA to the complexities of retirement tax issues. As you learn how to grow your wealth faster and more securely by diversifying your investments among both traditional and alternative options, you'll quickly realize just how easy and rewarding it is to be the one in charge of your future.

## Book Information

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## Customer Reviews

Adam Bergman, Esq., a recognized expert on IRAs and 401(k)s, is a senior tax partner with the IRA Financial Group LLC, and managing partner of the Bergman Law Group LLC. Founder of the BergmanIRAResport.com and the Bergman401KReport.com, he is also the author of *Going Solo: America's Best Kept Retirement Secret For the Self-Employed*; and a frequent contributor

to Forbes. Additionally, he has been interviewed on CBS News, and his retirement tax planning advice has been quoted in such publications as Businessweek, CNN Money, Smart Money, and USA Today. Previously, Bergman worked as a tax and ERISA attorney at White & Case LLP, Dewey LeBoeuf LLP, and Thelen LLP, three of the most prominent corporate law firms in the world. He is a member of the tax division of the American Bar Association and the New York State Bar Association.

Very good source of information for those considering getting out of passive IRA investment in the mutual fund market. I am venturing into rental property and I found this book quite helpful with information not readily available. The book has a conversational approach between a mentor and novice which is supposed to help keep the reader interested since the subject matter is very dry. I would have preferred a more condensed and straight forward approach, more like a textbook. However it is much better than trying to read the IRS guidelines which are not that helpful.

Very informative book if you are considering utilizing an IRA for real estate investing. I recently opened an account with IRA Financial and have been very pleased with the support from Adam and his team. The book gave me the knowledge necessary to move forward. It also gives me great comfort knowing I 1) have the flexibility I need with the Checkbook IRA to purchase properties and pay for services I need(how else could you possibly do it?!?!), and 2)The experience Adam brings to my SDI....he is clearly one of the world's experts on this topic!. I look forward to reading the other investment books from Adam.

Very informational and easy to understand. There is a LOT of repetition, but it is very informative and helpful. I learned a lot.

Book is most informative and explains the self-directed IRA process to a "T".

If you're looking to use a checkbook IRA, this book will tell you what you need to know.

Loved it. Made a complicated process easier to understand. I am actually excited about getting better returns with alternative investing!

Excellent reading and in line with the IRS code...

Good info.

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