VANTAGE

Self-Directed Retirement Plans

Invest In Alternative Assets With Your IRA

Diversify Into Assets You Understand

Does your investment appetite expand beyond traditional investments like stocks, bonds, and mutual funds? If you've always believed that there was more out there than just traditional investments, you were right! The use of self-directed retirement plans has increased as investors have become increasingly frustrated with the performance of stock market-based investments. That is the value of a Vantage Self-Directed IRA -- you can place your tax-favored savings into the investments you understand and feel most comfortable with.

Since 1974, investors have been misinformed about the true investment choices permissible within retirement accounts. There are indeed alternative ways to build wealth for your family, and you can take control of your retirement account and direct your portfolio into assets you've been told weren't allowable in your IRA. You can buy property and precious metals with your IRA. You can invest in private companies, and you can partner your retirement monies with others to invest in things you know. At Vantage, our job is not to highlight the benefits of investing in alternative assets as a wealth building strategy, but rather, to make you aware of and comfortable with the fact that it is permissible. Embrace your freedom to choose and feel better about the direction of your financial future.

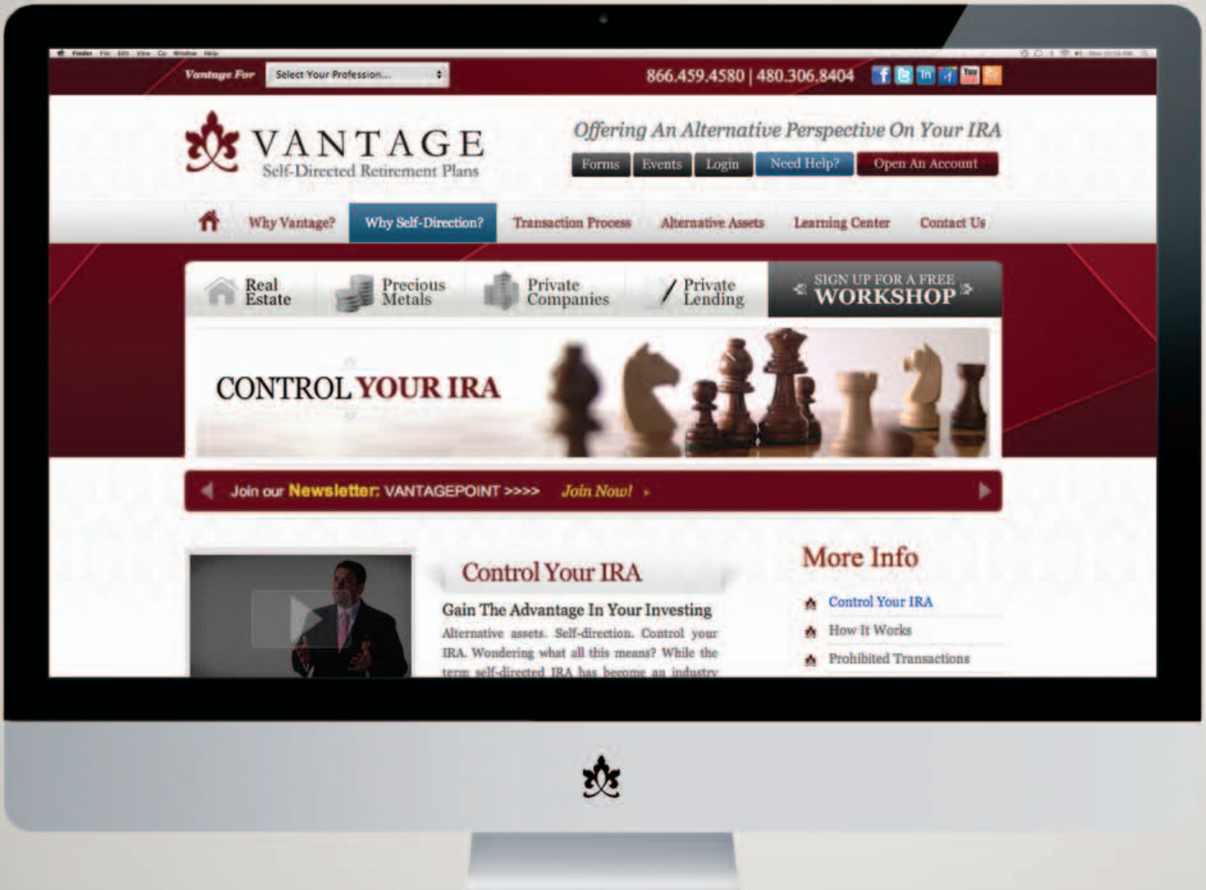
Mr. JP Dahdah

CEO, Vantage Retirement Plans, LLC

The Arizona Hispanic Chamber of Commerce's '2011 Entrepreneur of the Year' Award recipient, JP Dahdah graduated from The University of Arizona with bachelor's degrees in Finance and Marketing. He began his professional career in 1997 as a financial advisor with American Express Financial Advisors, Inc., a Fortune 100 company, and two short years later, he established Dahdah Global Wealth Management, LLC, a wealth management company that specialized in working with business owners.

In June 2004, JP started his second company, Entrust Arizona, which provided self-directed retirement plan administration and custodial services to individuals and small business owners who desired to include non-traditional assets, such as real estate, as part of their tax-deferred and tax-free portfolios. Entrust Arizona's client base grew to over 6,500 clients and $600M in retirement assets in less than eight years and on January 3rd, 2012, the Company re-branded and changed its business name to Vantage Self-Directed Retirement Plans.

Throughout his financial career, Mr. Dahdah has been a featured speaker at various financial workshops nationwide focusing on wealth accumulation, retirement planning, and tax-minimizing strategies. In 2009, he began hosting a weekly "Wealth Wednesdays" radio show on Arizona's premiere financial news station, KFNN 1510AM. He has been quoted in major national financial publications including *The Wall Street Journal, New York Times, and Fortune Magazine* and is actively involved in the Arizona community as a collaborator, partner, and sponsor of various philanthropic organizations.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More Info
Control Your IRA
How It Works
Prohibited Transactions

Alternative Investment Transaction Experience and Knowledge At Your Service

Set Your IRA Free!

Vantage Self-Directed Retirement Plans is the premiere retirement plan administration company catering to individuals and small business owners alike. Our name, Vantage, relates to the advantageous investing position that tax-favored self-directed IRAs offer investors seeking to diversify beyond the stock market. We excel at delivering the most personalized alternative investment transaction experience in the industry.

Our user-friendly website features a host of useful tools and simple step-by-step transaction guidance that helps you gain comfort with the self-directed investment process.

VTOOLS SELF-DIRECTED INVESTOR RESOURCES

Vantage has processed thousands of self-directed transactions for a variety of assets and investment structures. Timeliness and accuracy are key! How can we help you? Do you need to learn more about:

- opening and funding an account?
- initiating an asset purchase?
- the documents requested prior to funding an investment?
- maintaining your investment?

Our video tutorials, transaction checklists and flowcharts, and FAQs help you navigate the investment process stages and save time completing your transactions!


FINANCIAL
LITERACY

Vantage's Knowledge Center

Your Place For 'No Sales Pitch' Education

Increase Your Financial Literacy

Can you remember the last time you went to a workshop and weren't sold something? At Vantage, we understand that improving the financial literacy of the investment community is the first step to providing real value. We take pride in helping you gain the comfort you need to make more informed investment decisions by sharing both the facts and misconceptions of self-directed IRA investing via a multitude of FREE educational opportunities.

We do not provide investment advice nor do we endorse any products or services in any of our workshops.

Our focus is on offering FREE education on the brass tacks concepts and information that a potential self-directed investor would appreciate being enlightened to regarding "how to" maximize a retirement plan portfolio through increased investment choice and control. While most of our workshops are offered in our Knowledge Center, we do present to professional groups (10 person minimum). Join us at one of our FREE workshops to learn more about allowable investments you may not have considered before or known about.

Location, Location, Location

Hold Land, Residential, and Commercial Property In Your Vantage Self-Directed IRA

The powerful combination of value appreciation and income has historically been an attraction for investors who understand the risk-return tradeoff of real estate investing. You can own real estate of any kind within your IRA. Been told otherwise? Don't take our word for it. The Internal Revenue Code's rules and regulations provide the validation you and your trusted advisors often seek.

Section 408 of the Internal Revenue Code allows for the purchase of property with funds held in many common forms of IRAs, including a Traditional IRA, a Roth IRA, SIMPLE IRA and a Simplified Employee Pension (SEP) IRA.

Types of Property Your Individual Retirement Account Can Own

- Residential Single-family and Multi-family property
- Commercial and Industrial property
- Foreclosures, Short Sales, Distressed and Bank-Owned property
- Improved or Unimproved Land
- International properties of all types

Register for one of our FREE workshops to learn more!


GOLD
FINE SILVER

Protect Your Nest Egg

Own Tangible Assets With Intrinsic Value

The recent "gold rush" has made precious metal investing a popular alternative asset transaction. Investors view gold as a way to pass on and preserve their wealth from one generation to the next. Because of the metals' intrinsic value and history of reducing overall volatility and risk, many of our clients seeking to hedge against market cycles or inflation have turned to assets such as gold, silver, platinum, or palladium as a way to further diversify their investment portfolios.

Vantage is uniquely prepared to coordinate all the specific requirements involved with holding physical precious metals in your retirement plan, such as arranging for storage in a depository institution, handling the shipping process, coordinating valuations for IRS reporting, and providing account administration. Call us to learn more! We pride ourselves on being a great complement to the broker relationship you select and making the transaction process extremely timely so that you can buy and sell the metals you want when you want.


esh Organic
oduce
ade Cakes
Housewares

Fuel The Entrepreneurial Marketplace

Invest In Growth And Innovation

Private company investing – equity capital that is not publicly traded – has fueled America's economic growth. Infused by direct investments, immensely profitable successes like Google, Apple, and Microsoft were once private entities that have grown to public icon status.

Innovative entrepreneurs armed with their proven business models often seek growth capital to expand their operations. Vantage Self-Directed IRA investors have the freedom to invest in private companies that they are passionate about and to enjoy the tax-free profits generated by that company's competitive advantages.

Structures used to invest in private companies with an IRA include, but are not limited to, Limited Liability Companies (LLCs), Limited Partnerships (LPs), and C-Corporations (C-Corps). Sound intersting? Call us to learn more.

Because each business structure has unique advantages and disadvantages, we strongly encourage you to consult with the appropriate professionals to understand the ownership considerations and determine the structure(s) that best meet your unique investing and retirement planning needs.

Bridging Opportunities

Enjoy The Power Of Lending On Your Terms

Limited access to conventional financing has increased the demand for capital while simultaneously creating an opportunity for investors to earn above market returns through private lending. Rather than qualifying based on a traditional lender's credit profile, a borrower seeking private funds negotiates directly with the lender. Private lenders can lend at rates higher than traditional funding sources and have the freedom to structure repayment terms to their advantage. Savvy self-directed investors can offer this private lending source as their IRA provides the borrower with the capital needed to execute their investment strategy. In essence, your Vantage Self-Directed IRA can help you become the "bank."

A Promissory Note is one of the most commonly held private lending vehicles. As is true with all investing, private lending requires thorough due diligence and an understanding of both the opportunity and risk associated with the investment and its security instrument. Contact us for helpful checklists that identify the documents needed prior to funding secured (backed by collateral) or unsecured notes.

Vantage For Professionals

Tap Into The $17.3 Trillion Dollar Retirement Plan Industry

Add Self-Directed IRAs To Your Toolbox

Vantage combines self-directed retirement plan expertise with unmatched transaction support to help professionals serve clients who want to take control of their financial destiny through non-traditional investments. Because we understand that you require a variety of strategies and support systems to grow your business, we have developed educational workshops and self-directed investor resources that complement your business and help you differentiate yourself in the marketplace.

Understanding the power of a Vantage Self-Directed IRA and knowing the answers to the questions your clients ask about tax-deferred alternative investments can help you generate more business as you help clients seize opportunities to diversify their portfolios.

Maintain your existing relationships and build new ones by collaborating with Vantage to empower your colleagues and clients with knowledge about the investment flexibility available through self-directed IRAs. Register for one of our FREE weekly workshops or invite us to join you at your next office meeting!

Contact Us

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