

A Forge Trust Self-Directed IRA

For investors looking to enhance their portfolios with private company investments, understanding how to utilize retirement funds for these private offerings can be a game-changer.

Using retirement dollars to invest in private companies through Forge's platform can unlock a potential source of unrealized capital.

Below are a few of the advantages of investing in private companies through a self-directed IRA.

Tax Savings:

- **Tax-Deferred Growth:** By investing in private companies through a self-directed IRA, all investment growth is tax-deferred until withdrawal, allowing for potentially higher compound growth over time.
- **Tax Deductions:** Contributions to traditional IRAs can reduce taxable income for the year they are made, providing potential tax benefits. [See IRA contribution limits.](#)
- **Recordkeeping:** Custodians handle essential record-keeping, including tracking deposits, disbursements, and account activity, providing accurate reports for record-keeping needs.
- **No Capital Gains Tax:** Within an IRA, there are no annual capital gains taxes, which can be significant when dealing with the potentially high returns from private investments.

Strategic Investing:

- **Control and Flexibility:** Self-directed IRAs give investors the autonomy to choose where their funds are invested, allowing for more tailored approaches that align with specific retirement goals or market insights.
- **Long-Term Investment Horizon:** Retirement accounts are designed for long-term growth, matching well with the typical investment horizon of private companies, which often require time to mature.
- **Liquidity Considerations:** While private investments might be less liquid, the structure of a retirement account where funds are intended for long-term saving helps mitigate this issue, as investors can afford to wait for the right exit strategy.

By leveraging a diverse portfolio with private company investments along with the tax advantages of a self-directed IRA, investors can align long-term growth objectives with the potential to achieve superior returns.

This strategy not only has the potential to enhance portfolio performance, but it can also position investors to maximize possible returns and open an additional capital pool for investing.

If you wish to take advantage of utilizing retirement dollars to invest in a self-directed IRA with Forge Trust, please visit <https://app.forgetrust.com/create-account/?promoCode=ISFOR#!#select-account> to get started.

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