

Hedge Fund Investing in a Self-Directed IRA

Hedge funds are a class of investing vehicles that use one or more alternative investment strategies. Although hedge funds are designed for the more experienced investor, these investments are allowed in self-directed retirement plans.



Hedge Fund Facts

- These assets are not advertised or acquired on the open market
- They are available only to a limited number of accredited investors who should retain independent financial and/or legal counsel to evaluate risk and return.
- They must adhere to regulations of the Security and Exchange Commission and/or individual state securities administrators.

Benefits of Hedge Fund Investing in a Self-directed IRA

- Self-directed IRAs provide tax-sheltered retirement income on returns on investments.
- Hedge funds can add diversity to retirement portfolios.
- Unlock your IRA from the traditional investment options of stocks and mutual funds.

Steps to Hedge Fund Investing

1. Open a self-directed IRA account with Midland IRA. Plans include traditional and Roth IRAs, SEP, SIMPLE, and individual 401(k) plans, as well as health and education savings plans.
2. Fund the account by making a contribution or transferring funds from another plan to your Midland IRA account.
3. Identify the hedge fund and contact the manager.
4. Complete a subscription agreement for the investment.
5. Instruct Midland IRA with a letter of direction to send funds to the entity for purchase.

Midland IRA IS NOT A FIDUCIARY. Midland IRA's role as the administrator of self-directed retirement accounts is non-discretionary and/or administrative in nature. The Account holder or his/her authorized representative must direct all investment transactions and choose the investment(s) for the account. Midland IRA has no responsibility or involvement in selecting or evaluating any investment. Nothing contained herein shall be construed as investment, legal, tax or financial advice or as a guarantee, endorsement, or certification of any investments.

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