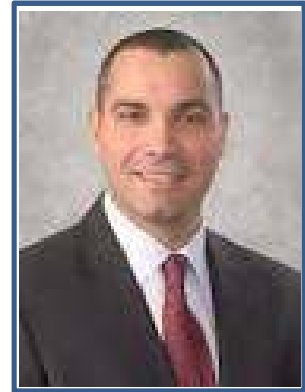


Upstate CREIA Presents –  
**John Hyre Self Directed IRA Workshop**

**Saturday & Sunday, May 20 & 21, 2017 from 9 – 5pm**

**Workshop Schedule**



**Saturday, May 20, 2017**

This 2-day schedule assumes a great deal of time for Q&A.

- 9:00 am Choice of Retirement Account (Roth vs Traditional, IRA, SEP Simple, 401(k), which is best for you?)
- 10:00 am 15-minute break
- 10:15 am Health Savings Accounts & Coverdell Educational Savings Accounts
- 11:15 am Prohibited Transaction Rules, we'll walk through the relevant parts of Code Section 4975 – Very important, most discussions of PT Rules only cover a very small part of this key Code section.
- 12:30 pm Lunch included with registration.
- 1:30 pm Prohibited Transactions – Review Court Cases & Dept. of Labor Rulings – how the government views PT's, what the courts have allowed and where they are headed.
- 2:30 pm Prohibited Transactions – Free-Flow Q&A, examples – This topic is that one that gives rise to the vast majority of IRA questions in my practice.
- 3:15 pm 15-minute break
- 3:30 pm "Checkbook LLC's" – When are they worth the hassle, IRS traps, drafting tips, how most CBLLC's could kill your IRA, errors most CBLLC promoters make.
- 4:00 pm What I have seen in audits and in Tax Court, how to deal when the IRS comes knocking, where the IRS is headed and why I won both cases. Very, very few lawyers, gurus or CBLLC promoters have this kind of experience. No recording of this particular session shall be permitted.
- 5:00 pm End of Saturday Class

## **Sunday, May 21, 2017**

- 9:00 am Unrelated Business Income Tax (UBIT) – What is it? How to avoid it, when to be thankful for it.
- 10:00 am Over-Contributions – an interesting way to get more money into the account
- 10:30 am My favorite technique to make a \$5,000 IRA into a \$100,000 IRA
- 11:00 am 15-minute break
- 11:15 am Rental case study (Includes leverage, lease options, self-storage and mobile home parks)
- 12:30 pm Lunch included with registration.
- 1:30 pm Flip Case Study (Assignments, options, A-B-C Transactions, rehab & retail)
- 2:00 pm Discounted notes case study
- 2:30 pm Gold, silver & guns
- 3:00 pm 15-minute break
- 3:15 pm Address some or all of the case studies you sent in ahead of time. A free-for all Q&A, basically an IRA brawl. According to attendees at past events, this is the best part.
- 5:00 pm Class adjourns