

## ABOUT

# Equity Trust



## REIMAGINE YOUR RETIREMENT™

Equity Trust empowers individual investors and financial professionals by removing barriers to true investment freedom. With an Equity Trust account, investment possibilities are nearly limitless, from stocks and mutual funds to real estate, notes, private entities, cryptocurrency and much more — all through a single custodian.

We deliver a simplified investment experience through innovative technology and first-class service, achieved through an unmatched 50 years of experience\* in the financial services industry.

Equity Trust is a state-regulated, non-depository trust company, with a staff dedicated to serving our clients. As a directed custodian, we do not offer investments or investment advice.



## THE EQUITY TRUST ADVANTAGE

You have your choice of self-directed IRA custodians. So why choose Equity Trust? The difference is clear:

### True Investment Freedom

Nearly limitless investment options include stocks, bonds, mutual funds, real estate, private entities, cryptocurrency, precious metals, and more

### Connection to Opportunities

Investment District online marketplace helps you locate potential investments

### Innovation and Technology Deliver a Simplified Investing Experience

State-of-the-art online account management system myEQUITY provides easy, around-the-clock account and investment management capabilities from any device

### Trusted Custodial Experience

- 50 years of experience\*, including as an industry-leading custodian specializing in alternative assets
- Clients from all 50 states have entrusted us to be the administrator of \$45 billion in retirement assets (as of 1/1/24)
- State-chartered trust company registered with the state of South Dakota

### Operational Excellence

- More than 400 client-minded associates focused on helping clients
- Dedicated representatives provide personalized service
- More than 2 million transactions efficiently processed each year

### Industry-Leading Wealth-Building Education

Regular educational and inspirational opportunities include newsletters, webinars, videos, case studies, resource guides, and more



[TRUSTETC.COM](https://www.trustetc.com) | (855) 673-4721

\*The predecessor business to Equity Trust Company was established in 1974 and the IRS approved as a custodian in 1983.

Equity Trust Company is a directed custodian and does not provide tax, legal or investment advice. Any information communicated by Equity Trust Company is for educational purposes only, and should not be construed as tax, legal or investment advice. Whenever making an investment decision, please consult with your tax attorney or financial professional.