

WINNING WITH SELF-DIRECTED IRAS

NOVEMBER 6-7, 2023
LAS VEGAS, NV



RITA

RETIREMENT INDUSTRY TRUST ASSOCIATION

Fall Conference

Retirement
Industry Conference



Gain Access to Top Experts and Influencers in the Self-Directed Retirement Plan Industry.

SUPERB EDUCATION AND INSIGHTS

Connect with trust company professionals, plan administrators, regulatory and compliance experts, and private equity and real estate attorneys.

WHO SHOULD ATTEND?

Trust companies, banks, third-party administrators, RIAs, CPAs, attorneys and professionals in the self-directed retirement industry.

[CLICK HERE TO REGISTER](#)

“Attending RITA’s Conferences is a must for retirement industry professionals. The value received from interacting with others in the industry and discussing current topics, challenges and issues is immeasurable. The knowledgeable speakers have always been on point and relevant to the constantly changing retirement landscape that we all are trying to successfully navigate.”

- Jeff Worley, Sr. Vice President, GoldStar Trust Company

TABLE OF CONTENTS

Conference Overview	3
Registration	5
Hotel Accommodations	6
Hotel Layout	7
Spring 2024 Conference	8
IRA Institute	9
Webinars	10

CONFERENCE OVERVIEW

The Retirement Industry Trust Association (RITA) exists to be the leading educator and advocate for the growth and guidelines of the self-directed retirement plan industry. We provide resources, information, communication, and support to both our members and consumers.

Join charter members with over \$127 billion in assets at this eye-opening and comprehensive conference.

NOTICE OF FILMING & PHOTOGRAPHY

Please note that photographs and footage will be taken throughout RITA’s Fall 2024 Conference. These will be used by RITA for marketing and publicity in our publications, on our website and in social media or in any third party publication. Please contact the event organizer at rita@rita.us.org if you have any questions or concerns.

[CLICK HERE TO REGISTER](#)

BENEFITS OF ATTENDING

- Critical Updates from Key Regulators
- Get the Latest Legislative Intelligence Affecting Your Business
- Interact with Other Industry Professionals & Expand Your Networks
- Discover the Best Ways to Move Your Business Forward

WHAT TO EXPECT

- Legislative & Regulatory Updates from Leading Experts & Government Officials
- Latest Tips on Cybersecurity
- Discussions on Operations & Compliance
- Tools & Insights for Fraud Prevention

According to IBISWorld, the market size of the retirement planning industry has grown 4.1% per year on average between 2018 and 2023.

LEARN HOW TO MAXIMIZE YOUR SHARE!

RITA WAS ESTABLISHED IN 1987 TO:

- Promote, through legislative and regulatory lobbying activities, the interests of trustees, custodians, and administrators of self-directed retirement plans holding alternative assets.
- Encourage the development and use of uniform procedures in the administration of self-directed retirement plans.
- Provide a forum for the exchange of general information about the efficient administration of self-directed retirement plans.
- Improve business conditions in the industry devoted to marketing self-directed retirement plans.
- Stimulate personal and professional development and education among members.

REGISTRATION

Early Bird Registration
Ends September 13, 2023

Regular Registration

Members	\$1,195	\$1,395
Non-Members	\$2,395	\$2,495

CLICK HERE TO REGISTER

* Above pricing does not include registration fees.

There will be a surcharge for all conference attendees who do not stay at the Hilton National Mall and live more than 50 miles away. RITA is responsible for the room block with discounted room rates and encourages all attendees to stay at the conference hotel to enhance your networking opportunities.

RITA provides **NO REFUNDS** on event registration.

THANK YOU, SPONSORS!



“RITA’s conferences are essential for anyone navigating changing legislation and regulations in the self-directed retirement plan sector. We send several of our staff members to the conferences each year to stay up-to-date on industry issues and guidelines. The insights they receive from the incredible speakers and engaging group discussions are invaluable to their individual career growth, and for the growth of our company as a whole.”

-Barbara Van Zomeren, EVP & COO, Ascensus

HOTEL ACCOMMODATIONS

An unforgettable stay awaits at the Encore at Wynn Las Vegas. Encore is an exclusive five-star resort and casino located right on The Strip. It offers luxury accommodations, two swimming pools, an award-winning spa, and signature restaurants with cuisines ranging from premium steaks to classic Italian. The hotel is within walking distance of all restaurants and attractions on Las Vegas Boulevard.



\$209/night

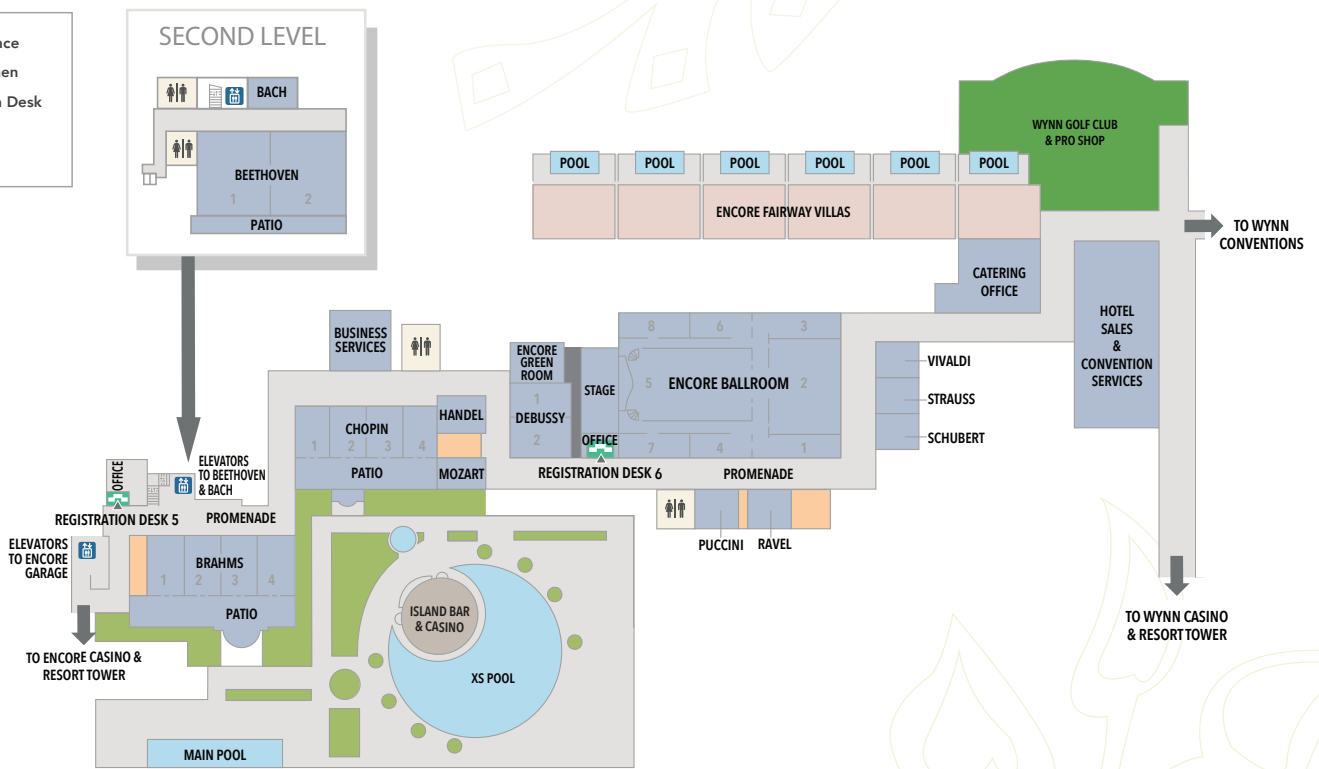
**A daily resort fee of \$45.00 plus 13.38% tax will be added to each guest room account.*

RESERVE YOUR ROOM BY OCTOBER 3, 2023

RESERVE YOUR ROOM HERE

ENCORE

- Meeting Space
- Pantry/Kitchen
- Registration Desk
- Dining
- Restrooms



SAVE THE DATE

RITA Spring Conference

Spring into the Future
with Self-Directed IRAs

April, 2024

Washington DC

SHOWCASE YOUR COMPANY

Want to get prime time exposure for your company?

BECOME A SPONSOR

VIRTUAL IRA ADVANCED INSTITUTE

The only one of its kind in the industry.

RITA's IRA Institute includes classroom instruction, breakout sessions, and presentations led by industry experts. Passing this class is the first step in obtaining a Self-Directed Industry Professional (SDIP) certification.

BENEFITS OF THE PROGRAM

- Hands-On Industry Knowledge from RITA Leaders
- Peer Discussions to Enhance Learning Experience
- Extensive IRA Reference Materials and Objective-Based Training Materials

LEARNING OBJECTIVES

- IRAs with Emphasis on Self-Directed IRAs
- Anti-Fraud Measures
- Prohibited Transactions
- Investment Issues, such as real estate, LLCs, private placements, and promissory notes

WHO CAN BENEFIT?

- RITA Members
- Attorneys
- Cryptocurrency Experts
- Prospective Members
- CPAs
- Real Estate Professionals
- IRA Professionals
- Banking Regulators
- Registered Representatives

**JOIN US AND EXPAND YOUR KNOWLEDGE
SPRING 2024 | FALL 2024**

[CLICK HERE TO LEARN MORE](#)

RITA WEBINARS

Join our convenient and educational webinars to keep up-to-date on current industry changes. Each 1-hour webinar addresses prominent and relevant issues in the self-directed retirement plan industry.

RITA Members receive FREE access to webinars as well as 1 continuing education credit toward their Self-Directed Industry Professional (SDIP) Certification.

UPCOMING 2023 WEBINAR DATES

- October 19, 2023



PAST WEBINAR TOPICS INCLUDE...

- Privacy Issues & State Privacy Laws
- Updates on IRS Extensions, Inflation Reduction Act and SECURE 2.0
- No Gold At Home? Reflections on the McNulty Case
- Cryptocurrencies in SDIRAs

[CLICK HERE TO LEARN MORE](#)