

# Spring Into the Future

with Self-Directed IRAs

April 29-30, 2024

Washington DC



**RITA**

RETIREMENT INDUSTRY TRUST ASSOCIATION

Retirement  
Industry Conference

**Spring Conference**



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

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## **SUPERB EDUCATION AND INSIGHTS**

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

## **WHO SHOULD ATTEND?**

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

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**[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

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## CONFERENCE OVERVIEW

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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.

[CLICK HERE TO REGISTER](#)

## **BENEFITS OF ATTENDING**

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- 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**

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- Legislative & Regulatory Updates from Leading Experts & Government Officials
- Latest Information on Digital Currencies in SDIRAs
- Insights on Cybersecurity & Fraud Prevention
- Roundtable on Relevant Industry Topics

**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:**

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- 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 March 22, 2024

### Regular Registration

Members	\$1,195	\$1,395
Non-Members	\$1,895	\$2,595

[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

Treat yourself to an upscale experience at The Royal Sonesta Washington DC Dupont Circle. Tucked inside the cosmopolitan Dupont Circle neighborhood, this Washington DC boutique hotel offers tastefully appointed guest rooms and specialty suites. Stay within minutes of George Washington University, the White House, the Kennedy Zoo, and the key DC monuments. Enjoy a plethora of amenities, including 10,000 square feet of flexible meeting space, onsite fitness facilities, an outdoor pool, and more.



**\$259/night**

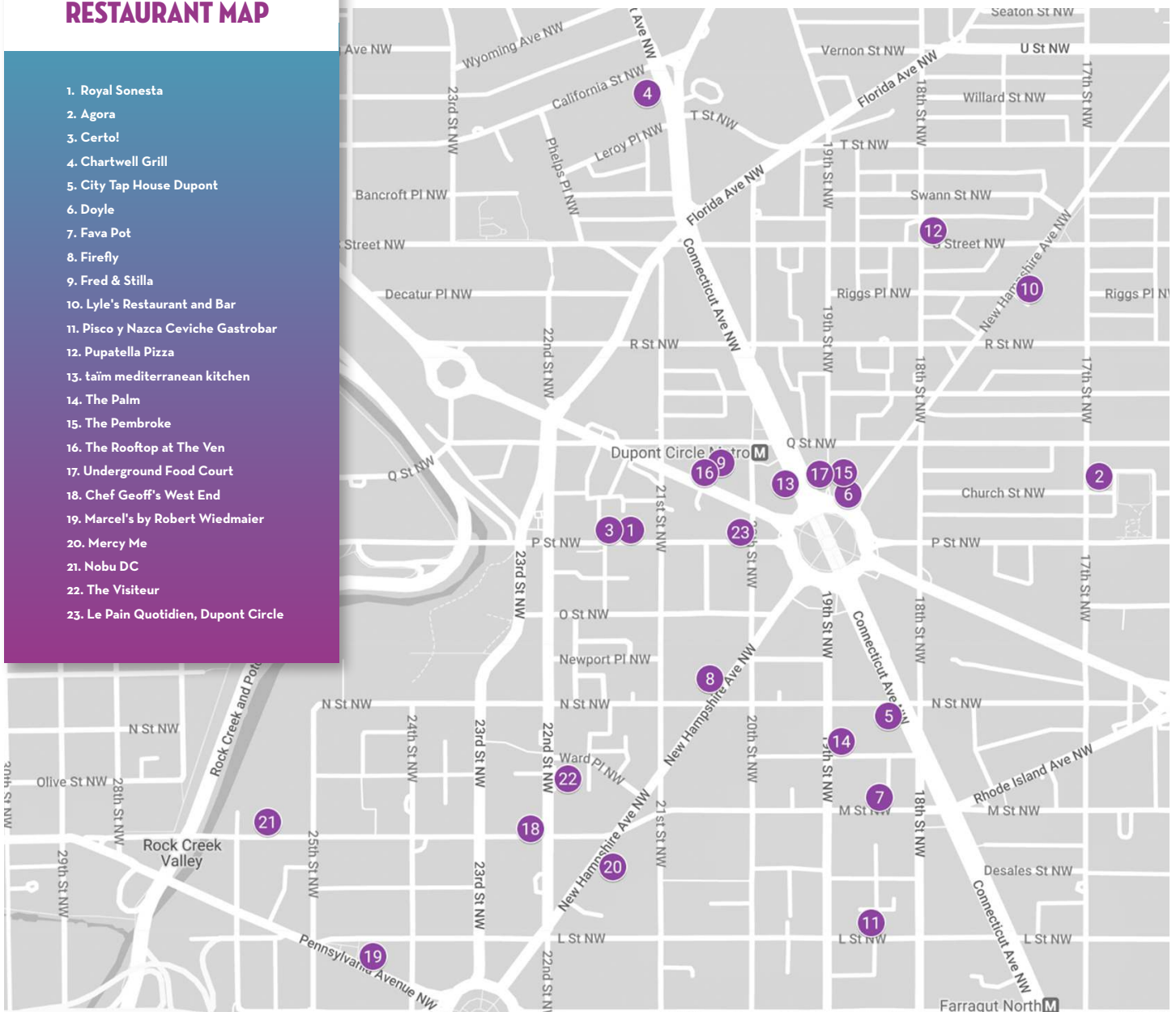
**RESERVE YOUR ROOM BY APRIL 3, 2023**

**RESERVE YOUR ROOM HERE**



**RESTAURANT MAP**

1. Royal Sonesta
2. Agora
3. Certo!
4. Chartwell Grill
5. City Tap House Dupont
6. Doyle
7. Fava Pot
8. Firefly
9. Fred & Stilla
10. Lyle's Restaurant and Bar
11. Pisco y Nazca Ceviche Gastrobar
12. Pupatella Pizza
13. taïm mediterranean kitchen
14. The Palm
15. The Pembroke
16. The Rooftop at The Ven
17. Underground Food Court
18. Chef Geoff's West End
19. Marcel's by Robert Wiedmaier
20. Mercy Me
21. Nobu DC
22. The Visiteur
23. Le Pain Quotidien, Dupont Circle



**SAVE THE DATE**

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**RITA**  
RETIREMENT INDUSTRY TRUST ASSOCIATION

RITA Fall Conference

# On the Horizon

with Self-Directed IRAs

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October 29-30, 2024 | Scottsdale, AZ

**SHOWCASE YOUR  
COMPANY**

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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**  
**JUNE 24-28, 2024 | SEPTEMBER 16-20, 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.



## 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](#)