



FALL 2025 CONFERENCE

# UNLOCKING POTENTIAL

with Self-Directed IRAs

November 13-14, 2025 | Irvine, CA

**RITA**  
RETIREMENT INDUSTRY TRUST ASSOCIATION



# 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

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 \$148 billion in assets at this eye-opening and comprehensive conference.

## 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

[CLICK HERE TO REGISTER](#)

## WHAT TO EXPECT

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- Updates on Accredited Investors, Cryptocurrency, Artificial Intelligence, & More
- Guidance on Anti-Fraud Initiatives & Cyber-Insurance Concerns
- Exploring the Potential Industry Impact of the Expansion of Alternative Assets in 401ks
- Interactive Roundtable Discussions on Navigating Common Industry Issues

**According to IBISWorld, the market size of the retirement and pension plans industry has grown at a 6.0% compound annual growth rate 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 September 17, 2025

**Regular Registration**

<b>Members</b>	<b>\$1,195</b>	<b>\$1,395</b>
<b>Non-Members</b>	<b>\$2,595</b>	<b>\$2,795</b>

[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 hotel venue 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!



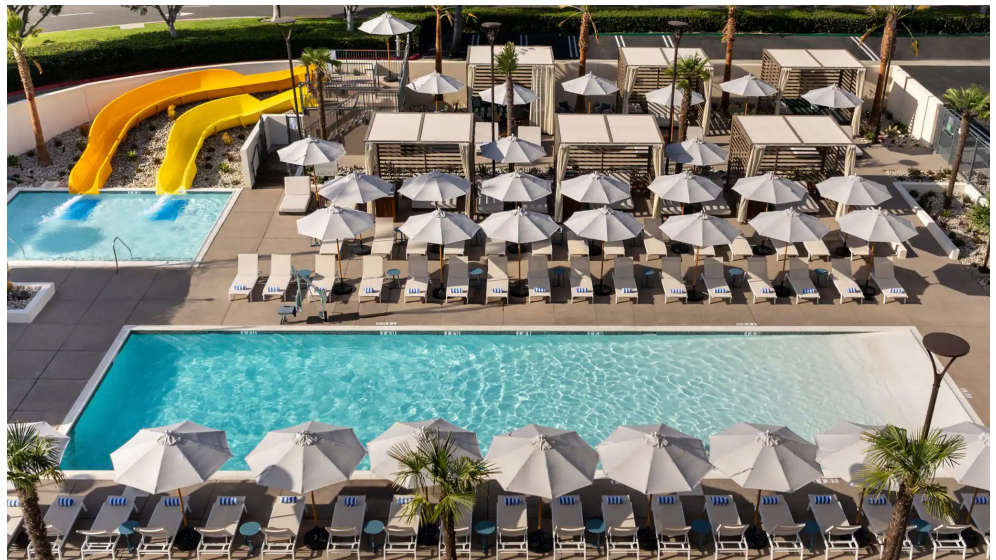
“RITA’s conferences are essential for anyone navigating changing legislation and regulations in the self-directed retirement plan sector. We send several of our staff members to the conferences each year to stay up-to-date on industry issues and guidelines. The insights they receive from the incredible 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, SVP, Ascensus**

## HOTEL ACCOMMODATIONS

### Hyatt Regency Irvine

Kick back and indulge in the SoCal vibes at Hyatt Regency Irvine. The fully renovated hotel allows you to make the most of your Irvine stay, with a gorgeous swimming pool oasis, sophisticated and modern rooms and suites, and expansive spaces to host your most important events.



Centrally located on Jamboree Road in Irvine, the hotel puts you near the area's top activities, from family-friendly Disneyland day trips to luxury shopping at South Coast Plaza to fun in the sun at Newport Beach.

# \$219/night

\*Resort fees have been waived for RITA Conference attendees.

## RESERVE YOUR ROOM BY OCTOBER 16, 2025



## RESERVE YOUR ROOM HERE

## EXPLORE IRVINE, CA



### FREE THINGS TO DO

- Balboa Island
- Catalina Island
- Irvine Ranch Historic Park
- Manassero Farms Tanaka Farms
- Boat Trips & Cruises
- Great Park
- Irvine Spectrum Center
- Newport Beach Wild Rivers Waterpark
- Bommer Canyon Park
- Irvine Historical Museum
- Laguna Beach
- Quail Hill Park & Trail

### LOCAL EVENTS

#### CALIFORNIA ART EXHIBITIONS

SEPTEMBER 20 - JANUARY 10

UC Irvine Museum of California Art is hosting two featured exhibits, "Habitat: Making the California Environment" and "Meditative Mind: Reflections in Stillness."

[LEARN MORE](#)

#### LOS ANGELES RAMS VS. SEATTLE SEAHAWKS

NOVEMBER 16 | 1:05 PM PT

An hour's drive from the hotel venue, the Los Angeles Rams are playing the Seattle Seahawks at SoFi Stadium in Inglewood, CA.

[LEARN MORE](#)

#### MORE EVENTS COMING SOON

NOVEMBER 2025

Bookmark the Destination Irvine events calendar to learn about more upcoming local events as they're announced.

[LEARN MORE](#)

[VIEW DESTINATION IRVINE WEBSITE](#)

**SAVE THE DATE**

**RITA**  
RETIREMENT INDUSTRY TRUST ASSOCIATION

RITA Spring Conference

# LEADING THE WAY

**for Self-Directed IRAs**

**April 20-21, 2026 | 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 2026 | FALL 2026**

**[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](#)