

MAT SORENSEN

ATTORNEY • AUTHOR • SDIRA EXPERT

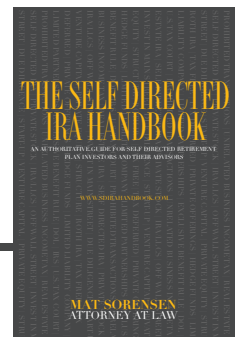


Mat Sorensen is a lawyer, best-selling author, national speaker, and an expert on self-directed retirement accounts.

Author

Mat is the author of ***The Self Directed IRA Handbook: An Authoritative Guide for Self-Directed Retirement Plan Investors and Their Advisors***. *The Self Directed IRA Handbook* has received numerous distinctions.

- Over 15,000 Copies Sold and an Amazon Best-Seller.
- The most widely used and referenced book in the self-directed IRA Industry.
- Endorsed or used for training by nearly all major self-directed IRA custodians.
- Used by the Retirement Industry Trust Association (RITA) as part of industry certification.



Attorney

Mat has advised thousands of self-directed retirement plan investors. In addition to account owners, his clients have included trust companies, financial institutions, insurance companies, hedge funds, self-directed IRA custodians, and third party administrators.

ATTORNEY AT LAW

MAGAZINE

Attorney at Law Magazine profiled Mat's niche legal practice in self-directed IRAs in an article called, *Building a Niche Practice*, in 2015.

Leading Expert

- Self-Directed IRAS and Alternative Investment:
How the \$25 Trillion in Retirement Plans can be Invested in Real Estate and Private Companies
- Owning Real Estate with Self-Directed IRAS and 401ks

National Speaker & Expert

Mat routinely speaks to investors and professional groups on self-directed IRA topics. Mat has provided expert advice to federal and state regulators on self-directed IRA issues.

Mat is the host and keynote speaker at the **Self-Directed IRA Summit** held annually in Scottsdale, AZ.

self-directed IRA summit



Mat serves as a primary instructor for the Self-Directed IRA Professional Certification Program. The Certification program has hundreds of attendees that have included Sales, Compliance, CEOs, General Counsel, and regulators from across the self-directed IRA industry. RITA is the premier national association representing the self-directed retirement plan industry.

Education & Professional License

B.S. University of Utah, Economics, 2001

J.D. University of Maryland School of Law, 2004

Member of Arizona Bar Association

Testimonials

The *"Self-Directed IRA Handbook"* by attorney Mat Sorensen is the most comprehensive book ever written about one of the best investment and retirement savings tools ever created: the Self-Directed IRA. Mat has performed the impossible by effectively delivering complex information in an easily understandable manner for the layperson, while providing the necessary legal basis to suit the professional. Mat's book is a "must read" for investors, attorneys, CPAs, and other professionals and other interested individuals wanting to learn about all there is to know about Self-Directed IRAs.

Tom W. Anderson, - Founder and Retired CEO, Pensco Trust Company, President, RITA



Mathew is an excellent attorney, well versed in the Self-Directed IRA market...His ability to distill the complexities of the Self-Directed IRA so that the average person can understand them, and ensures that they don't get "tripped up" is second to none. Anyone interested in this Self-Directed IRA Market would do well to connect with Mathew and learn from the best.

Gary Shumm, - Vice President, IRA Services Trust Company



I highly recommend The Self Directed IRA Handbook to anyone seeking to enhance his or her knowledge of how best to invest retirement funds in alternative assets through a self-directed IRA plan.

Mary Mohr, - MBA, JD, Executive Director, RITA



Sample of Recent Speaking Engagements



National Association of Personal Financial Advisors (NAPFA), Spring National Conference, *“What Every Advisor Needs to Know About Self-Directed IRAs”*



Wealth Counsel State of Arizona Forum Education Meeting, *“What Every Lawyer and Advisor Needs to Know About Self-Directed IRAs”*



Retirement Industry Trust Association, RITA Institute Instructor, and over a dozen conference presentations on Self-Directed Subjects at RITA.



Certified Commercial Investment Member (CCIM), Various State Chapter Continuing Professional Education, *“Using Self Directed Retirement Plans to Invest in Real Estate.”*



Mat has numerous classes in different states approved for continuing education for licensed real estate professionals. Mat has taught thousands of real estate professionals at different Realtor events and meetings. He has served as the key note speaker for hundreds of attendees at a recent Realtor Education Conference.