



MILLENNIUM  
TRUST COMPANY®

# High-Net-Worth Investors are Sold on Real Estate

But they don't own much in their IRAs.

Most high-net-worth (HNW) investors are familiar with real estate as an investment. But what they might not know is that they can hold real estate in a self-directed IRA—or what the benefits could be of doing so.

A survey of HNW investors\* who already own investment real estate revealed some compelling opportunities.



## WHY?

- They may not realize the tax benefits.
- They may not know that a self-directed IRA provides more control over their investments.
- They may think holding real estate in their IRAs is not allowed, or is too risky or complicated.

Millennium Trust's proprietary research\* on alternative investments\* shows:



HNW investors are seriously thinking about adding real estate to their investment portfolios.

9 out of 10 of survey respondents say they're interested in it.

Many already own it.

**37%** own real estate as an alternative to a stock-and-bond-only portfolio.

They're earning income on it.

**63%**

are landlords of single-family rentals.

They're increasing their allocations to it.

**18%**

added new real estate assets to their portfolios last year.

They're about to keep more of their money from real estate investments.

Changes in the federal tax treatment of pass-through income will directly benefit many landlords and real estate developers.

Download our **Guide to Holding Real Estate in Your Retirement Account** for additional information.

\*Based on an April 2017 survey by Millennium Trust Company of 500 individuals ages 30 and up with household income of \$200,000+ who have invested in stocks, bonds or commodities through an IRA.

Millennium Trust Company performs the duties of a directed custodian, and as such does not provide due diligence to third parties on prospective investments, platforms, sponsors, or service providers and does not sell investments or provide investment, legal, or tax advice.