

MEDIA / PRESS KIT

Daniel Cordoba

Strategist – Educator – Author – Speaker

CEO, Asset Exchange Strategies, LLC

Founder, National Association of Tax Favorable Investing (NATF)

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BIOGRAPHICAL SKETCH

Knowledge Leader on Self-Directed IRA Investing

Dan Cordoba has an extensive reputation as the expert and knowledge leader in self-directed retirement investing. He is quoted and featured in numerous high-end media, and continues to be sought out for advice, consulting services, and education products through his company, Asset Exchange Strategies, LLC. He has a diverse background and is experienced in strategizing and executing self-directed retirement investment plans, the logistics of successful mergers/acquisitions, advising on financial and insurance planning, and managing engineers in high-tech companies.

Strategist

Daniel is a Self-Directed Advisor and an expert at assisting people to plan and strategize their IRA objectives with the goal of replenishing and controlling their retirement funds. AES offers a vast array of services and products to identify their client's specific needs, identify risk, return on investment and exit strategies.

Educator

AES's mission is to provide pertinent products that educate and guide individuals, real estate professionals, franchise investors, CPA's and other advisers and financial experts who wish to understand the benefits of, and learn how to implement self-directed retirement investing. AES offers over thirty-five education products on self-directed IRA investing at www.iratrainning.com.

Author

Author of "From Wall Street to Main Street", a guide on self-directed retirement investing

Author of "Tax Favorable Real Estate Transactions", a Texas Real Estate Commission approved real estate education course

Author of “How to Determine The Self-Directed IRA LLC or Self-Directed 401(k) Plan That Fits Your Needs”. Another book in the “From Wall Street to Main Street” series.

Author of "Tax Favorable Real Estate Transactions", a Texas Real Estate Commission approved real estate education course.

Speaker

Daniel is a frequent speaker at national investor groups, and instructor to high-producing real estate agents, Investment Talk Radio shows, and television news broadcasts. His powerful presentations are packed with a rich source of actionable information, which he expresses with clarity and precision. Speaker / Seminar Topics

- How to Exercise Tax Favorable Strategies
- Self-Directed Retirement Planning
- Leverage Asset & Entity Advantages
- Increasing Sales & Gaining Market Share by Building Your Self-Directed IRA Business

Awards: "Best in Client Satisfaction Wealth Manager for 2009", awarded by Texas Monthly

Education: BA, Business Management University of Phoenix, 1985

Professional History

1985 - 1987 Engineering Manager for high technology companies

1987 - 1993 Marketing/Sales Executive for high technology companies

1994 - 1997 Merger and Acquisition Specialist

1997 - 2002 Financial and insurance planning and sales

2000 - Founder and CEO of Asset Exchange Strategies, LLC

Professional Licenses

- Texas Department of Insurance Life and Accident Insurance.

Verify at <http://www.texasonline.state.tx.us/NASApp/tdi/TdiARManager>

Enter Cordoba and Daniel in agent box

- Texas Real Estate Commission Instructor: Real Estate Finance and Real Estate Investments Education on self-directed IRA investing. Download License document PDF
- NASD Investor Education on Professional Designations

Verify at <http://apps.finra.org/datadirectory/1/prodesignations.aspx#CEA>

COMPANY MISSION & HISTORY

Mission: National Advisors for Self-Directed Wealth Building

Asset Exchange Strategies (AES) / Asset Exchange Group, located near Austin Texas, is a consortium of financial professionals whose mission is to educate individuals about the benefits of Self-Directed IRA's available to them in the tax code, and to utilize traditional assets such as securities in retirement plans, and employ non-traditional assets such as real estate.

AES provides complete support, advice and reporting for non-traditional investments. They provide the tools, knowledge and expertise to use tax dollars to create wealth for our clients, their family, and for generations to come if desired. AES has benefit of the expertise of tax attorneys, CPAs, real estate agents, and other financial experts to find the appropriate methodology and tools. AES's specific area of expertise is in the alternative investment options for retirement products such as self directed IRA, SEPs, Simple IRAs and 401(k). For example, would the ability to incorporate real estate in an individual's Self Directed IRA or other non-traditional assets be advantageous? Would the ability to exchange assets within their retirement without tax implications be helpful? If so, we recommend AES's strategic approach to exploring what could be achieved today, and what can be built for the future!

In a Nutshell

Similar to a traditional financial advisor, Asset Exchange Strategies works with investors to assess their unique objectives, risk tolerance and other factors, educate them on options and institute a program that allows them to select from a much greater breadth of investment choices. By using their knowledge of industry regulations, AES is able to provide lower fees and greatly expanded investment options while enabling investors to have greater control over self-directed IRA investment transactions and reduce risks and liability through the protection of a Self-Directed IRA LLC.

Verify Corporate History

There are three ways to verify the facts:

- Better Business please use the phone number 512 528-0801 in the phone location to log in
Verify at <http://www.bbb.org/us/Find-Business-Reviews/>
- Our web site was up and running months before our competition had opened its doors
Verify at <http://www.dnsstuff.com/where-are-my-results/>
- An interview by On Wall Street was conducted on Sept 1, 2004 interviewing me on self-directed IRAs. Interview was actually conducted 4 months previously. That is two years before our closest competitor was in business.

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HISTORY OF SELF-DIRECTED IRA INVESTING

‘Expanding The Scope of Employee Retirement Plan Options’

By Daniel A. Cordoba, Principal, Asset Exchange Strategies, LLC

Today, many employees take advantage of the tax benefits that company-sponsored 401Ks, in addition to IRAs, afford them in investing for retirement. However, relatively few are aware that, in addition to investing in traditional stocks and bonds, non-traditional assets—such as vacation property, note financing, golf courses, franchises and other assets—are also permissible assets within an IRA. Investors in the know are now beginning to take advantage of this fact and are diversifying their retirement portfolios by investing in the booming real estate market, purchasing capital in private start-ups, and more.

The Self-Directed IRA (Individual Retirement Account) Defined

A Self-Directed IRA (and other retirement accounts such as SEP, Simple and 401 (k) Solo) is a plan in which the IRA holder has directional control over asset allocation. There are only a few investments that the IRA cannot invest in and there are certain parties that the IRA cannot participate with. Within those guidelines, however, the IRA holder is free to invest in whatever assets they feel will bring them the greatest returns and/or security, depending on his or her personal investing goals.

Historical Development

When the ERISA act of 1974 was passed, it ushered in the ability for the average taxpayer to provide for retirement on a tax-favorable basis. This era brought into existence the most prolific retirement savings program known to mankind. Anyone could now provide for his retirement on a tax-favorable basis. Although most people believe that the IRS is the governing agency, it is actually the Department of Labor that is charged with the management of retirement plans. The IRS’ function is to police the codes that define parameters of each retirement account.

The Department of Labor supplied the IRS with guiding documents, known as a plan document that provided the restrictions for each of these retirement plans. 401(k) covered the now popular employee retirement plan and the 408 governed the IRA. The plan document defines which assets are acceptable and their method of allocation. This plan document provided the asset manager parameters within which they could work. Upon the development of the plans the securities and insurance providers began to draft plan documents for employers that offered 401(k). These retirement plans, being complicated, carried a sense of awe about them, and corporate officers became dependent on the provider of retirement plans for their compliance expertise. Of course, these same providers created their own plan documents for the investment assets of IRA holders. With the fox being deeply entrenched in the hen house, at this point the only assets offered in the programs were securities and insurance products. Simply put, real estate and other non-traditional assets were not offered.

Recent Developments

Economic episodes and growing investor education through the Internet have created fertile ground for the custodian of Self-Directed IRA and other retirement plans. With the passing of the market correction of 2000, September 11th and recent corporate abuses, investors were actively seeking alternative investment vehicles for their retirement capital. At the same time, the Fed had reduced interest rates to their lowest position in decades, thereby fueling the real estate market. With the real estate market prospering, many retirement holders wanted to take advantage of equity gains in that market. This economic episode, in conjunction with the rise of the Internet-driven Information Age and investor disgust, initiated the migration of non-traditional assets into retirement accounts.

Beefing Up Employee Benefits Options

While an increasing number of individuals are discovering the self-directed IRA option as a smart alternative to traditional stock market investments, most companies are not aware of, or neglect to offer, this option to their employees because their plans are sponsored by a traditional brokerage firm for which it is outside the scope of the their offerings.

Organizations can add appeal and value to the retirement benefits they offer by making their employees aware of the option to invest their funds not only in stocks and bonds, but in non-traditional assets as diverse as: real estate, natural gas technologies, bridge loans, currency exchange, marinas, ATM machines, golf courses, motels and numerous others, in which they are knowledgeable or personally interested and/or that may be profitable investments to leverage within their IRAs.

The Role of the Self-Directed IRA Advisor

It is impermissible for an IRA custodian to offer advice to the investor. They must maintain a neutral position and can therefore only convey the IRS regulations and their investment policies to the investor. The Self-Directed IRA Advisor should have the expertise to provide the investor with advanced methodology and advice. A good Self-Directed IRA Advisor will be able to offer these benefits: Advisory support and education, which educates the investor and helps to put all the pieces of the Self Directed IRA puzzle together, enabling them to see the bigger picture and make the most educated investment decisions; Checkbook control providing the ability to write checks with IRA funds through an IRA LLC; More economical solution because individuals are matched with an IRA Custodian based on their specific needs; Increased control by offering investors the ability to structure their own deals without custodial micro-management; Protection from creditors and litigation, through increased overall asset protection.

Conclusion

With the many advantages that non-traditional IRA investments enable, including greater control over investment options, tax favorable income and, perhaps most importantly, the ability to safely count on higher returns with less risk than the stock market, it can be a highly valued vehicle for investors of all levels. Employers can supercharge their benefits plans and add value by passing this knowledge to enrolled employees and directing them on working with an advisor who can assess their unique objectives, risk tolerance and other factors, educate them on the full breadth of their options and help them to institute a program that allows them to select from a vast array of investment choices while minimizing risk and liability.

PRESS ROOM

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Asset Exchange Strategies, LLC is the leading Self Directed IRA advisory firm in the nation.

These pages contain just a small number of the articles and press releases that have been written about the organization.

February 15, 2010: [Asset Exchange Launches Franchise Network \(AEFN\)](#) - *Entrepreneurs and Established Businesses Owners Tap Into the Newly Offered Franchise Model*

MSN Money – “Invest Your IRA in Real Estate?”

Almost without fail, experts say it's a really risky move to sink your retirement IRA into a rental or land. But some are doing it -- and doing well at it.

Kiplinger's Magazine - “Invest Your IRA in Real Estate?”

March 2005 issue of Kiplinger's Magazine references MyRealEstateIRA.com. Article was re-ran in the Fall 2005 Retirement Guide of Kiplinger's Magazine.

On Wall Street - “Outside Protection: Real estate in an IRA? “

It's possible if your wealthy clients use an outside custodian - Here's how to make the most of self-directed investment accounts.

Wall Street Journal - “You Did What With an IRA? People Start Investing in Condos, Timberland, Even Businesses; Avoiding Trouble With the IRS. “

Article makes mention of Asset Exchange Group, LLC and highlights a number of pitfalls investors who self direct their IRAs fall into including "self-dealing" without the support of a

qualified Self Directed IRA Advisor, and when setting up IRA investment strategies outside of the stock market.

Forbes – “The IRA Steps Out”

With a "self-directed" account, your funds can seek out unconventional investments. IRA investors step-out to purchase Timberland and Real Estate cash flows with their IRA-LLC.

Business Week – “Blaze Your Own IRA Trail”

With a "self-directed" account, your funds can seek out unconventional investments. Asset Exchange Group provided the IRA LLC for Mr. Geraghty.

The Costal Times Coast News

A small but growing number of people are using their retirement funds to invest in commercial real estate in hopes of turning a bigger profit.”

Investment Advisor

To help their baby boomer clients generate a decent income stream in retirement, advisors are increasingly investing their clients’ self-directed IRAs in alternative assets—everything from private equity, limited partnerships, and LLC’s to real estate and mortgages. Some are even developing new products to address this growing trend.

Women's Wall Street – “Getting Real (Estate) With Your IRA”

Whatever the reason, it may be time you for you start looking into investing your IRA (Individual Retirement Account) in real estate and other non-traditional IRA investments.

RealtyTimes.com – “Commercial Real Estate Investing With Your IRA”

A small but growing number of people are using their retirement funds to invest in commercial real estate in hopes of turning a bigger profit

Realty Times - “Commercial Real Estate Investing With Your IRA”

Article by Phoebe Chongchud on the Realty Times web site.

Austin Business Journal – “Asset Exchange Forms Partnership With Houston Firm”

Austin-based Asset Exchange Group, LLC will be a key company providing IRA LLC and other self-directed advisory services to Lifestyles Unlimited's 4000-plus members as a result of the new agreement. Asset Exchange advises individuals on how to invest in real estate and other non-traditional assets with their IRAs.

On Wall Street – “Outside Protection: Real estate in an IRA?”

It's possible if your wealthy clients use an outside custodian. Here's how to make the most of self-directed investment accounts.

Texas Realtor Association – “Put some Real Estate in Your IRA”

Take charge of your nest egg by investing in real estate through a self-directed IRA.”

CPA Wealth Provider – “Moving Away From Traditional Advisors.”

Most people would agree that the performance of the stock market in the past five years has been disappointing at best. As a result, a growing number of investors are taking matters into their own hands. The most common direction many are considering, if not already embarking on, is "self-directed retirement accounts," or investing in non-traditional assets, like real estate, businesses, notes, etc., with their IRAs.