

## **Why do people open IRAs**

People open IRAs to save for retirement. They are looking for tax-efficient ways to prepare for the future and they are also looking for a way to preserve and protect their assets against inflation so they have enough saved to meet their retirement goals.

People who open self-directed IRAs are more financially savvy, value independence, and want to take control of their financial future.

Knowing the emotional and psychological reasons people open IRAs is important to communicating the value of opening a TS IRA account.

## **Retirement Fears**

- Outliving my savings and investments
- Social Security will be reduced or cease to exist in the future
- Declining health that requires long-term care
- Not being able to meet the basic financial needs of my family
- Lack of access to adequate and affordable healthcare
- Cognitive decline, dementia, Alzheimer's Disease
- Finding meaningful ways to spend time and stay involved
- Feeling isolated and alone
- Being laid off - not being able to retire on my own terms

## **Why do people look forward to retirement**

- Traveling
- Spending more time with family and friends
- Pursuing hobbies
- Doing volunteer work
- Pursuing an encore career (pursuing a new role, work, activity, or career)
- Starting a business
- Continue working in the same field Other None of the above

[Source](#)

## **Traditional IRAs**

- IRAs play an increasing role in saving and investing for retirement
- Many traditional IRA owners became owners as a result of rollovers from employer-sponsored plans, which occur after at least some years in the workforce.
- IRA owners plan for retirement carefully
- Greater control of investments
- Preserve tax advantages
- Not leave assets with a former employer
- Convenience and more access to investment options

## **Crypto IRA**

- Portfolio diversification
- Hedge against inflation
- Believe prices will go up
- Tax-deferred
- Seeking alternative assets
- More control of their savings
- A nest egg for retirement
- specialized savings opportunities they offer

## **TS Crypto IRA - Features/Benefits**

- Earn interest
- Security
- No custody fees
- No hidden fees
- Customer service
- Easy disbursements of funds
- The streamlined and efficient onboarding process
- Hassle-free rollovers
- Trading platform
- significantly reduce their tax burden compared to selling BTC if it was a personal investment.

## **What the audience is looking for in an IRA provider**

### **Transparency & Communication**

- No surprises or curveballs
- Transparency is key
- Process and fees clearly explained
- Fair market prices for coins
- Ability to track profit and loss
- Identify and differentiate the companies fees as well as the custodians' fees

### **Easy Onboarding**

- Walking the customer through the process step-by-step
- The onboarding process must be optimized
- Clear and easy to follow instructions regarding setting up the account, funding, transfer process, and establishing a new account.
- Making it as easy as possible for customers to rollover their IRA or 401k is important
  - Easy to transfer my IRA into crypto IRA
  - Smooth rollover process

- Phone, email, and chat support are important. Customers need to feel confident they can reach customer service at any time as they are entrusting you with a huge investment — their retirement savings
- Make clear how long it takes to fund:
  - Contribution: 1-week
  - IRA Transfer: 1-2 weeks
  - Employer Plan Rollover: 3-4 weeks
- Explain the intricacies

### **Customer Service**

- Exceptional customer service
- Open lines of communications
- The customer service team must be equipped with the knowledge to clearly and confidently explain the product and steps of setting up and maintaining their accounts
- Describe how the digital currency purchasing process works
- Quick response times are critical to not losing out due to fluctuating market prices

### **Low Fee structure**

### **Access & Security**

- Cyber security
- Need to be able to access funds as needed without hassle or confusion

### **Education**

- Education is key
- Prospects are looking for information to answer their questions
- Product comparison

## Competitor Positioning and Messaging

	iTrust Capital	Bitcoin IRA	BitIRA
<b>Company Stats</b>	<ul style="list-style-type: none"> <li><a href="#">\$2 Billion in Trade Volume</a></li> </ul>		100,000 users Over \$1.5 billion in transactions 2,500 5-star user reviews
<b>Mission</b>	Our mission is to not only help those with existing retirement accounts but also educate those without retirement accounts on the tax-deferred and tax-free benefits of IRAs.	We believe in making the complex process, simpler and safer. Our goal is to be fully transparent and straightforward to help you achieve your retirement goals with cryptocurrencies.	At BitIRA, we firmly believe that Americans should have access to more choice of assets available within their tax-advantaged retirement account.
<b>Value Proposition</b>	The world's leading digital asset IRA investment platform, iTrust Capital is disrupting the \$35.4 trillion US retirement assets market by serving as an intermediary tool for clients to directly buy, sell, and trade cryptocurrencies and physical gold and silver in real-time through their retirement accounts.	The world's first, largest, and most secure digital asset IRA technology platform that allows users to purchase cryptocurrencies and physical gold for their self-directed retirement accounts.	The world's first insured cold storage solution for your Bitcoin IRA.
<b>Tagline</b>	The #1 Crypto IRA Retirement Platform	America's #1 Bitcoin IRA	Bitcoin For Your IRA
<b>Differentiator</b>	Offers gold and silver IRAs \$370M Custody Insurance	<ul style="list-style-type: none"> <li><a href="#">New Crypto IRA mobile app</a></li> <li>Offers Gold IRAs</li> <li>Earn interest in IRA</li> <li>\$100M Custody Insurance</li> <li>Crypto IRA Knowledge Center</li> </ul>	Insured cold storage
<b>Home Page Title</b>	iTrustCapital   The #1 Crypto IRA Retirement Platform	Bitcoin IRA™   The Official Crypto IRA Retirement Platform	Bitcoin For Your IRA   Rollover an IRA or 401(k)   BitIRA®
<b>Meta Description</b>	iTrustCapital is the #1 Crypto IRA / 401k platform offering cryptocurrencies, gold, and silver within your retirement accounts.	Self-trade cryptocurrencies 24/7 inside your IRA. Includes \$100M custody insurance. Join 100,000+ users and start today.	Discover how to supercharge your retirement by rolling your IRA or 401(k) to a Digital Currency IRA. Get a free info guide on moving your retirement to Bitcoin.
<b>Facebook Bio</b>	The #1 Crypto IRA Platform in America! Take control of your retirement today. Trust America's #1 Bitcoin IRA and invest in your future with revolutionary digital assets.		The world's first insured cold storage solution for your Bitcoin IRA.

	Open a free account† and self-trade 24/7.		
	<b>iTrust Capital</b>	<b>Bitcoin IRA</b>	<b>BitIRA</b>
<b>Twitter Bio</b>	Tax-Free Crypto Trading. Welcome to the future.	We're the world's first and largest cryptocurrency retirement platform. Invest in Bitcoin, Ethereum, Litecoin, and more, tax-free within your crypto IRA.	Open a Digital IRA 💰 Buy Crypto 📈 Tax-Deferred 🌿 \$BTC \$ETH \$LTC \$XLM \$BCH + MORE LEARN MORE HERE: <a href="http://bitira.com">http://bitira.com</a>
<b>LinkedIn Bio</b>	Helping investors access their favorite Crypto Assets within their IRA / 401k Accounts.	The world's first, largest, and most secure cryptocurrency IRA platform.	N/A
<b>Top organic keywords</b>	<ul style="list-style-type: none"> <li>• Itrustcapital</li> <li>• is chainlink a good investment</li> <li>• crypto ira</li> <li>• itrustcapital reviews</li> <li>• itrustcapital roth ira</li> <li>• itrustcapital promo code</li> <li>• itrustcapital fees</li> </ul>	<ul style="list-style-type: none"> <li>• bitcoin ira</li> <li>• bitcoinira login</li> <li>• crypto ira</li> <li>• ira bitcoin</li> <li>• bitcoinira fees</li> <li>• cryptocurrency ira</li> </ul>	<ul style="list-style-type: none"> <li>• bitcoinira login</li> <li>• Bitira</li> <li>• how does digital currency work</li> <li>• types of digital currency</li> <li>• crypto 401k</li> <li>• empower retirement cryptocurrency</li> <li>• td ameritrade crypto</li> </ul>
<b>Marketing Tactics</b>	<ul style="list-style-type: none"> <li>• Content marketing</li> <li>• Education</li> <li>• Promotion - <a href="#">Six months free</a></li> <li>• Press releases</li> <li>• Paid ads</li> <li>• Customer reviews</li> <li>• <a href="#">Affiliate program</a></li> </ul>	<ul style="list-style-type: none"> <li>• Content marketing</li> <li>• Education</li> <li>• Press releases</li> <li>• Paid ads</li> <li>• Industry reports</li> <li>• <a href="#">Affiliate program</a></li> <li>• Customer reviews</li> <li>• <a href="#">\$100 referral program</a></li> <li>• <a href="#">Customer success stories</a></li> </ul>	<ul style="list-style-type: none"> <li>• Content marketing</li> <li>• Education</li> <li>• Press releases</li> <li>• <a href="#">Affiliate program</a></li> <li>• Customer reviews</li> <li>• Paid ads</li> </ul>

## **Group Messaging**

- **The all in one solution to actively manage your IRA**

Take control of your retirement with a self-directed IRA to actively manage your retirement savings, gain tax advantages, and choose from a variety of traditional and alternative investments.

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