Adam Bergman, Esq.

Adam Bergman is a well-known figure in the world of retirement planning, particularly for his pioneering work in the self-directed IRA (Individual Retirement Account) industry. As the founder of IRA Financial, a leading firm specializing in self-directed retirement accounts, Adam has built a reputation as a highly respected expert on alternative investments and tax-advantaged retirement strategies.

Before founding IRA Financial, Adam worked as an attorney specializing in tax law, focusing on retirement and investment strategies. His extensive knowledge of tax codes, ERISA (Employee Retirement Income Security Act), and IRS regulations gave him a unique perspective on the potential benefits of self-directed retirement accounts, which at the time were relatively underutilized.

In 2010, Adam Bergman launched IRA Financial with the goal of facilitating the setup of self-directed IRAs and also providing comprehensive guidance on how to structure these accounts and navigate the legal intricacies involved. A self-directed IRA allows individuals and business owners to invest in a wide range of assets, including real estate, private equity, cryptocurrencies, precious metals, and even startups, which traditional IRAs do not permit. Under Adam's leadership, IRA Financial Group grew into one of the largest and most recognized firms in the self-directed IRA space with over 25,000 clients and over $5B in assets invested.

Adam has written extensively on topics such as self-directed IRAs, the legality of alternative investments, and tax strategies. In addition to authoring 9 books, his work has been featured in over 100 prominent media outlets such as Forbes, The Wall Street Journal, and Business Insider. In addition to his writing, Adam has appeared as a speaker at numerous financial and investment conferences and podcasts, where he shares his insights on the future of retirement planning and alternative investments. His expertise and ability to simplify complex tax and legal concepts have made him a trusted resource for both individual investors and financial professionals.

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