INVESTOR SERVICES

Account coverage

One custody platform for every goal — more than twenty account types.

Whatever a client is saving toward, there's an account for it — and one custodian behind all of them.

Retirement

- Self-Directed IRA
- Roth & Traditional IRA
- SEP & SIMPLE IRA
- Solo 401(k)
- Inherited / Beneficiary

Health & education

- HSA
- Coverdell ESA
- 529 Plan

Wealth & institutional

- Taxable Brokerage
- Trust Accounts
- Private Fund Custody
- Entity & LLC Accounts

What each can hold

The platform's full range — stocks, ETFs, funds, bonds, and cash, plus real estate, private equity, private credit, precious metals, and digital assets — drawn on according to the account type, its governing documents, and applicable tax and securities rules.

2026 IRA quick figures

Contribution limit

$7,500 total across Traditional + Roth IRAs — $8,600 if age 50+.

Roth income phase-out (MAGI)

Single/HoH $153,000–$168,000 · Married filing jointly $242,000–$252,000.

Figures current for tax year 2026 (IRS). Educational only — not investment, legal, or tax advice. Consult a qualified professional.