



Transfer In-Kind Confirmation

Form Submission Instructions: (Please Choose One)

STRATA offers two convenient options for transmitting your requests:

Option 1: **SERVICENOW**, e-sign and submit forms securely to STRATA. Use this option for faster form submission.

Go to <https://www.stratatrust.com/resource-center/forms/> for form access and instructions.

Option 2: You may print + email, fax, or mail the form as shown below:

Email: InvestmentUpdates@StrataTrust.com
Fax: 512.495.9554
US Mail: PO Box 23149, Waco, TX 76702
Overnight: 7901 Woodway Drive, Waco, TX 76712

Please let this form serve as confirmation that _____ (Investment Name) has updated our records and changed the registration for the IRA investor listed below:

Investment/Company Name: _____

Number of shares, or capital balance: _____

Current Investment Amount: \$ _____

Effective Transfer Date: _____

Registration: STRATA Trust Company, Custodian

FBO _____ IRA # _____
PO Box 23149
Waco, TX 76702
TAX ID: 26-2637994

| | |
|--|------------------|
| Investment Issuer's Authorized Signature | Date |
| Printed Name of Person Signing | Title |
| Mailing Address | City, State, Zip |
| Phone Number | Email |

Important Reminders

* Issuer understands that all payments (dividends, redemptions, return of capital, etc.) will be mailed to STRATA at the Registration Address listed above.

** If the investment provides monthly/quarterly reports, please send duplicates to STRATA at InvestmentUpdates@StrataTrust.com.

***This form should not be used to confirm debt, real estate, or investments that issue stock certificates or book entry shares.