

Use this form to provide supplemental instructions to STRATA Trust Company with regards to your IRA.

This form should not be used for directing an investment in Private Equity, Private Debt, Real Estate or Structured Settlements. Please use the appropriate Investment Checklist if investing in one of these investment types.

## Form Submission Instructions:

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: [Operations@StrataTrust.com](mailto:Operations@StrataTrust.com)  
 Fax: 512.495.9554  
 US Mail: PO Box 23149, Waco, TX 76702  
 Overnight: 7901 Woodway Drive, Waco, TX 76712

## Section 1 Account Information

|   |       |                |
|---|-------|----------------|
| Accountholder Name                          |       | Account Number |
| Social Security Number (Last 4 Digits Only) | Phone | Email Address  |

## Section 2 Instruction

I hereby instruct and authorize STRATA Trust Company ("STRATA") as IRA Custodian, to process the following instructions on behalf of the above referenced IRA Account:

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## Section 3 Authorized Signature Must be signed by either the Accountholder or ADR (if one has been designated)

I understand that STRATA Trust Company ("STRATA") shall not be responsible or liable for any loss or expense which may arise or result from compliance with any directions I may give. I understand STRATA will have a reasonable amount of time to complete my instructions. In addition, I understand that the above referenced Account may be charged or credited accordingly with the necessary fees, expenses, net earnings, gains, losses, appreciation or depreciation attributable to the Account as a result of the processing of my instructions. In accordance with all terms of the IRA Custodial Account Agreement, I agree to release, indemnify, and hold harmless STRATA from any claims arising out of the processing of these instructions which are authorized by my signature below.



Accountholder Signature

Date