



# Interested Party Designation Request

Client Services  
866.928.9394  
512.637.5739

www.StrataTrust.com

Send to: (Please submit using one method)  
Email: AccountMaintenance@StrataTrust.com  
Fax: 512.495.9554  
US Mail: PO Box 23149, Waco, TX 76702  
Overnight: 7901 Woodway Drive, Waco, TX 76712

Please complete the information on this form if you wish to add or remove an Interested Party ("IP") on your account. An IP will have unlimited access to your account information. STRATA Trust Company will not accept investment instructions from your IP.

## Section 1 Account Information

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

## Section 2 Election and Interested Party Information

<input type="checkbox"/>	I hereby elect to <b>add/designate the Interested Party</b> whose name and information is shown in section 3 below on my account.	
<input type="checkbox"/>	I hereby elect to <b>remove the Interested Party</b> which I previously designated on my Account.	
IP Name		
IP Firm Name (if applicable)		
IP Address		
City	State	Zip
IP Phone #	IP Fax #	
IP Email		

## Section 3 Signature Accountholder must sign and date below

I understand that I have the option to designate or remove an Interested Party ("IP") on my Account at any time. My IP may be any person or firm I choose and will have access to: (1) receive copies of any correspondence related to my Account with STRATA Trust Company, including, but not limited to, my Account statements, (2) view my Account online or receive online statements, (3) discuss my Account with STRATA Trust Company and (4) have unlimited access to information regarding my Account with STRATA Trust Company

By signing below, if any controversy, claim or dispute arises relating to the release of or providing account information, Accountholder acknowledges and agrees to release, indemnify, defend and hold STRATA Trust Company harmless.



Accountholder Signature

Date

Internal Use Only
IP Removed: _____ Remove from: _____ InnoTrust _____ InnoVue Add to: _____ InnoTrust _____ InnoVue