



NOTE MODIFICATION AGREEMENT

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- ◆ E-sign and transmit directly to STRATA
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Use this form to modify the terms of a note investment held in your IRA. Please complete all information.

| SECTION 1 | ACCOUNT INFORMATION | | |
|---|--|-----------------------|------------------------------------|
| Accountholder Name | | Account Number | |
| Daytime Phone | Social Security Number (Last Four Digits Only) | Email Address | |
| SECTION 2 | CURRENT NOTE INFORMATION | | |
| Borrower Name | | | |
| Current Note Amount | | Current Interest Rate | Current Maturity Date (MM/DD/YYYY) |
| SECTION 3 | REQUESTED NOTE MODIFICATION | | |
| Note Amount | | Interest Rate | Maturity Date (MM/DD/YYYY) |
| Payment Frequency | | Number of Payments | Payment Amount |
| Must include a copy of amended agreement containing both the accountholder and borrower's signatures. | | | |
| SECTION 4 | SIGNATURES –ACCOUNTHOLDER MUST SIGN AND DATE BELOW | | |

I acknowledge that I have sole responsibility for directing the investment of my Account. I acknowledge that STRATA Trust Company ("STRATA") will not exercise any discretion, assume any fiduciary responsibility, perform a due diligence review, or undertake any investigation as to the prudence, viability, merits, or suitability of the Note investment identified above ("Investment"). I acknowledge my understanding that STRATA is not a "fiduciary", or a person entitled to exercise any discretionary authority with respect to the Investment, as those terms and concepts are defined in the Internal Revenue Code, ERISA, or other applicable federal, state or local laws, and I agree to hold STRATA harmless from any liability for any loss, damage, injury or expense which may occur as a result of the execution of this Note Modification. I understand that this Note Modification becomes effective on the date on which this form is signed by both parties.



Accountholder Signature

Date

FORM SUBMISSION OPTIONS (Please submit using one method below)

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

Client Services 866.928.9394 | Service@StrataTrust.com | Online: www.StrataTrust.com/Service-Request