



Information Change Request

Account Designation

Looking for an easier, faster way to submit paperwork? Try the **SERVICENOW** option at www.StrataTrust.com/Forms
♦ E-sign and transmit directly to STRATA ♦ Safely upload supporting documentation ♦ Securely transfer data with SFTP file protocol

Use this form to update contact information (address, phone, or email) for an existing Account Representative, Interested Party, or Power of Attorney listed on a STRATA Trust Company ("STRATA") IRA.

You may only update or change contact information if the accountholder has previously authorized you on the STRATA IRA account. If you are listed as an Account Representative or Interested Party on multiple STRATA IRA accounts, submitting this form will update your contact information on all associated accounts.

Section 1 Tell Us About Yourself

Please select your role: ☐ Account Representative ☐ Interested Party ☐ Power of Attorney

First
Name

Last
Name

Company Name
(if applicable)

Phone

Email

Section 2 New Contact Information

Please indicate the information you wish to update below. Leave any fields you do not want to update blank.

☐ Mailing
Address

City

State

Zip

☐ Phone

☐ Email

☐ Fax

Section 3 Terms and Conditions

I hereby certify that all the information provided is true and correct and may be relied on by STRATA. I understand that STRATA will send confirmation of the change to the previous and current addresses.



Authorized Signer's Signature

Date

Form Submission Options

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

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