



Information Change Request Precious Metals Dealer

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Authorized agents of precious metals broker/dealer may use this form to update contact and/or funding information for existing investments that have been onboarded to STRATA Trust Company's ("STRATA's") platform.

For any legal name or company name changes, a new Precious Metals Dealer Representation Letter is required.

This change request form must be signed by an authorized agent of the firm, as defined by the articles of incorporation or a formal signing authority resolution. STRATA may request a letter of authorization from the company before processing change requests.

Section 1 Existing Contact Information

First Name	Last Name	
Dealer Name		
Mailing Address		
City	State	Zip
Dealer Email	Phone Number	

Section 2 New Contact Information

Select **only** the contact information you would like to update.

<input type="checkbox"/> Mailing Address		
City	State	Zip
<input type="checkbox"/> Phone	<input type="checkbox"/> Fax	
<input type="checkbox"/> Email		

Section 3 New Wire Information (Optional)

If you would like to update your wiring instructions, please complete the section below. *Note: Any new information provided will override all previously submitted wiring instructions.* If no changes are needed, leave this section blank.

Bank Name	Bank Phone Number	
Bank City	Bank State	
ABA Routing Number (Must Be 9 Digits)		
For Credit To	Account Name	Account #
For Further Credit To	Account Name	Account #

Section 4 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: NewInvestments@StrataTrust.com
- US Mail: PO Box 23149, Waco, TX 76702
- Overnight: 7901 Woodway Drive, Waco TX 76712

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