



Communications Preference 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 Dr, Ste 200, Waco, TX 76712

Complete this form to request a change in how you receive your account communications on your STRATA IRA. Communications include your periodic account statements, invoices, tax forms, notices and other correspondence issued by STRATA.

Section 1 Account Information	
Accountholder Name	Account Number
Social Security Number	Daytime Phone
Email Address <small>(A valid, unique email address is required)</small>	

Section 2 Communications Preference	
I hereby request to receive all future Communications issued by STRATA in the manner indicated below:	
<input type="checkbox"/> Electronic Communications (Online) You must complete the online self enrollment for Online Account Access on our website, StrataTrust.com . You will be notified by email when a communication has been uploaded to your account.	<input type="checkbox"/> Paper Communications by First-Class U.S. Mail You will be responsible for the annual Paper Statement fee. All paper communications will be sent by first-class U.S. Mail to your address of record.

Section 3 Signatures <small>Accountholder must sign to authorize.</small>	
By signing below, I hereby authorize the Communications Preference indicated above for my Account(s) and understand that I may change this election at any time. If electing to receive Paper Communications, I understand that I will incur the annual Paper Statement fee as shown on STRATA's current IRA Fee Schedule.	
 _____	_____
Accountholder Signature	Date