



Power of Attorney Designation

Client Services
866.928.9394
512.637.5739
www.StrataTrust.com

Send to: (Please submit using one method)
Email: Operations@StrataTrust.com
Fax: 512.495.9554
US Mail: PO Box 23149, Waco, TX 76702
Overnight: 7901 Woodway Dr, Ste 200, Waco, TX 76712

Please complete the information on this form if you wish to add or remove a Power of Attorney ("POA") on your account. Your appointed Attorney-in-Fact ("Agent") will have access to your account information as well as the ability to transact the duties outlined in your POA document. Please include a copy of the fully-executed Power of Attorney document with this form.

Section 1 Account Information

Accountholder
Name

Account
Number

Section 2 Power of Attorney Designation

☐ I hereby elect to **add/designate** the following Agent to my Account.

☐ I hereby elect to **remove** the following Agent which I previously designated to my Account.

Agent
Name

Firm Name
(if applicable)

Agent
Address (no PO Boxes)

City

State

Zip

Agent
Phone #

Agent
Date of Birth:

Agent
SSN:

Agent
Email

Section 3 Signature Accountholder must sign and date below

I understand that I have the option to designate or remove an Agent with POA on my Account at any time. My Agent 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 ("STRATA"), including, but not limited to, my Account statements, (2) view my Account online or receive online statements, (3) discuss my Account with STRATA, (4) have unlimited access to information regarding my Account with STRATA, and (5) transact the duties authorized within the attached POA document.

By signing below, I confirm that the attached POA is a true and correct copy of the original POA currently in force. If any controversy, claim or dispute arises relating to the Agent, Accountholder acknowledges and agrees to release, indemnify, defend and hold STRATA harmless.



Accountholder Signature

Date

Internal Use Only Remove from: ☐ InnoTrust ☐ InnoVue
Add to: ☐ InnoTrust ☐ InnoVue