STRATA AT A GLAI

WHO WE SERVE



Individual Investors

Simple custody solutions for self-directed IRA investments allowing greater control and flexibility over retirement portfolios.



Streamlined and scalable institutional self-directed IRA solutions that deliver value to your investors.

BY THE NUMBERS

\$5B 40K

Assets Client Under Accounts Custodv

and Platforms

9K Investments Employees

350 75+

Years of Collective Experience

INVESTMENT **OPTIONS**

Self-directed IRAs offer a broad range of investment options to choose from, including:

- Directly owned real estate
- Private equity or debt investments
- Trust deeds or mortgage notes
- Promissory notes or . corporate debt
- Closely-held stocks
- Equity or debt • crowdfunding
- Public or private LPs or LLCs
- **REITs**
- **Precious metals**
- Brokerage accounts for publicly-traded stocks, mutual funds, or ETEs

ABOUT US



Founded in 2008



Subsidiary of Horizon Bank



1300+ Reviews, 5-Star Rated Industry-Leader



100% Organic Growth



Carve your own path to retirement.™

Investment Products: Not FDIC-Insured • No Bank Guarantee • May Lose Value

THE DETAILS MATTER

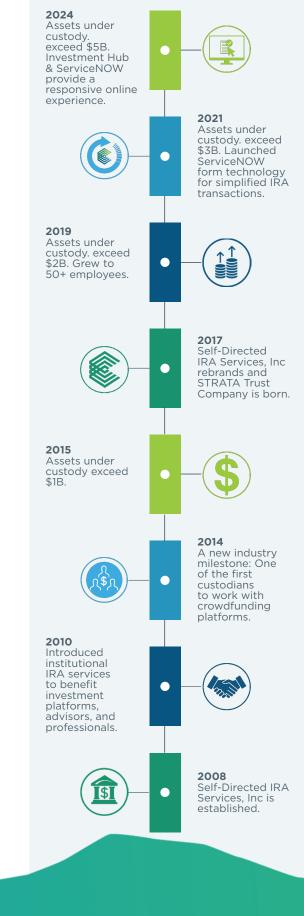
- Investment flexibility beyond what most banks, brokerage firms, and other financial institutions allow.
- Intuitive customer-focused technology for seamless selfdirected IRA managment.
- Unmatched personalized service with easily accessible, knowledgeable, and dedicated representatives.

WHAT SETS **STRATA** APART



SAFEGUARDS AND STABILITY

- Texas trust company charter with safety and soundness exams by the Texas Department of Banking.
- Regular audits by independent third-party auditors to ensure compliance with financial statements, reporting, data security, and IRA operations.
- Comprehensive corporate liability insurance package through underwriters rated A++ (Superior) by A.M. Best (for STRATA's protection only, does not cover client assets).
- Uninvested funds held in FDIC-insured accounts.
- Broad privacy safeguards to ensure the security of client records.



Carve your own path to retirement.™

STRATA