

STRATA AT A GLANCE

WHO WE SERVE



Individual Investors

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



Financial Professionals

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

BY THE NUMBERS

\$6B

Assets
Under
Custody

40K

Client
Accounts

9K

Investments
and
Platforms

75+

Employees

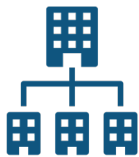
350

Years of
Collective
Experience

ABOUT US



Founded in
2008



Subsidiary of
Horizon Bank



1300+ Reviews,
5-Star Rated
Industry-Leader



100% Organic
Growth

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 ETFs



STRATA
TRUST COMPANY

Carve your own path to retirement.™

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

- Investment flexibility beyond what most banks, brokerage firms, and other financial institutions allow.
- Intuitive customer-focused technology for seamless self-directed IRA management.
- 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.

2024

Assets under custody exceed \$6B. Investment Hub & ServiceNOW provide a responsive online experience.

2021

Assets under custody exceed \$3B. Launched ServiceNOW form technology for simplified IRA transactions.

2019

Assets under custody exceed \$2B. Grew to 50+ employees.

2017

Self-Directed IRA Services, Inc rebrands and STRATA Trust Company is born.

2015

Assets under custody exceed \$1B.

2014

A new industry milestone: One of the first custodians to work with crowdfunding platforms.

2010

Introduced institutional IRA services to benefit investment platforms, advisors, and professionals.

2008

Self-Directed IRA Services, Inc is established.



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