

# STRATA at a Glance

Alternative assets-expert custody—defined by experience, *distinguished by service.*

## 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

**\$10B+**

Assets under custody

**48K+**

Client accounts

**14K+**

Investments and platforms

**80+**

Employees

**350+**

Years of collective experience

## About us



Founded in 2008



Subsidiary of Horizon Bank



2,100+ 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



[www.StrataTrust.com](http://www.StrataTrust.com)

## The details matter

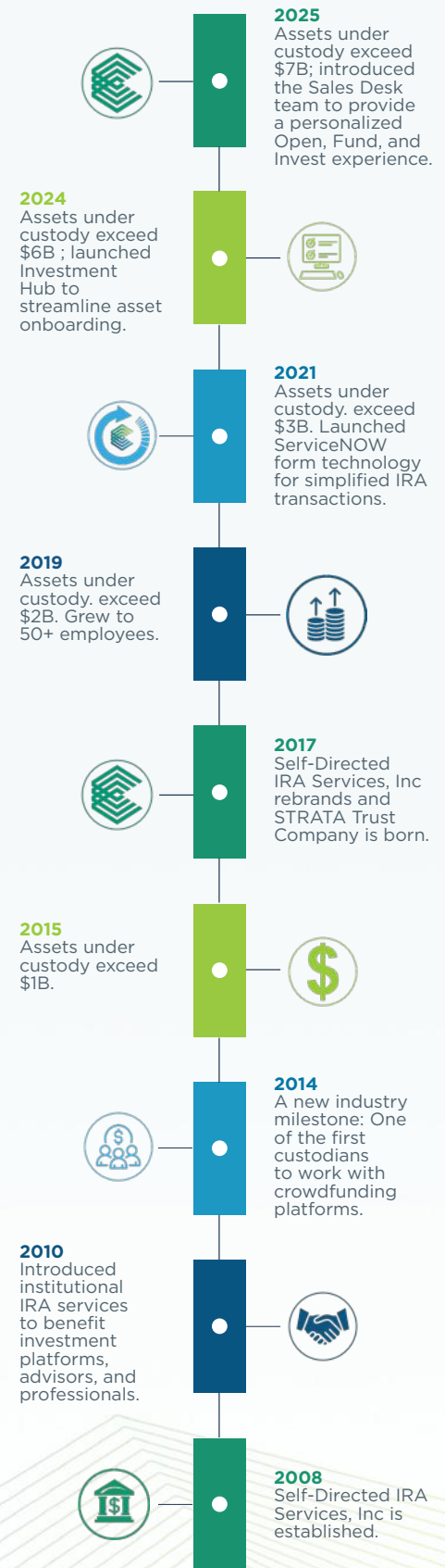
- Investment flexibility beyond what most banks, brokerage firms, and other financial institutions allow.
- Intuitive customer-focused technology for seamless self-directed IRA management.
- Unmatched personalized service with easily accessible, knowledgeable, and dedicated representatives.

## What sets STRATA apart



## Safeguards and stability

- Texas trust 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; this is for STRATA's protection only and does not cover client's assets.
  - Error & Omission
  - Directors & Officers
  - Cybersecurity
- Uninvested funds held in FDIC-insured accounts (250k per depositor).
- Broad privacy safeguards to ensure the security of client records.



*Carve your own path to retirement.™*

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