PREFERRED Legacy Trust

A DIVISION OF CARR, RIGGS & INGRAM CAPITAL, LLC

The Preferred Legacy National Trust

Family Business Advisory

Comprehensive Family Planning & Advisory Services

- Bank Advisory
- Family Business Advisory
- Private Investment Advisory
- Trust and Estates

Family Stewardship & Philanthropy

- Charitable Gifting
- Family & Donor Foundation Advisory
- Family Education
- Family Gifting
- Family Meeting

Fiduciary Services

- Trust & Estate Administration
  - Revocable Trusts
  - Irrevocable Trusts
  - Charitable Trusts
  - Domestic Asset Protection Trusts
  - Estate Settlement
  - Insurance Trusts
  - Testamentary Trusts
- Retirement Plans Trustee
  - ERISA Plans
  - Individual Retirement Plans

Household Financial Management

- Bill Payment
- Concierge Services
- Financial Reporting
- Household Payroll
- Real Estate Advisory

Operating a family business can often produce challenges that are drastically different from those dealt with by non-family owned businesses. Often, the family business owner is dealing with the daily demands of managing and growing their business and does not have the opportunity to address the myriad of situations facing their company until circumstances bring them to light. Whether it be succession planning, or an offer to purchase is on the table for consideration, family business owners can often benefit from a trusted advisor who can supply guidance and support through these situations.

As a member of the CRI Family of Companies, The Preferred Legacy National Trust Bank's advisors can leverage their relationships with their various business partners to identify your company's strengths and weaknesses in specific areas of your business, whether it be through financial consulting services, succession planning, or even transaction assistance. Every effort is made to establish a beneficial relationship with an advisor that most closely meets the goals of you and your family business. Our professionals provide solutions and walk alongside you to obtain the assistance required, from adding capital through a debt solution or capital raise or even facilitating the best time to sell or merge your business.

The Preferred Legacy National Trust Bank's advisors possess a broad range of experience supporting individuals and families for generations. Our holistic approach to family business advisory services allows us the perspective needed to help you make decisions regarding a wide range of company matters. Our proactive planning can address all facets of your business, eliminating the worries that can inevitably occur when a situation might arise, allowing you the time to focus on your business and growing your legacy for years to come.