PREFERRED
Legacy Trust
A DIVISION OF
CARR, RIGGS & INGRAM CAPITAL, LLC

The Preferred Legacy National Trust

Preserve Your Roots. Grow Your Legacy.

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

Preserving your family's legacy can mean a range of different things: compiling stories and photographs, as well as memorializing beliefs and achievements for the benefit of future generations. More than just an effort to pass down hard-earned knowledge to these future generations, these attempts to promise that our legacy will live on long after we are gone. In providing a means for the legacy to continue, often a family's wealth comes into play, and more specifically: how do we manage the complex administrative tasks that come with wealth preservation?

Management of family wealth often requires an integrative approach. The Preferred Legacy National Trust Bank's network of professionals provide a tailored approach to family planning and advisory services, family stewardship and philanthropy, and household finance management, offering cross-functional experience to address the custom needs of high net worth families and individuals. Further executing your strategy by way of our relationships with you and your trusted team of advisors, we can address everything from business planning to real estate advisory services.

Whether it be charitable gift giving, or private investment strategy, The Preferred Legacy National Trust Bank is committed to knowing and understanding your family and business dynamics in order to scale our breadth of services to meet the needs of each individual and family. Having the right team in place for your trust needs allows you to adjust your focus where you want it to be: creating the life you want while preserving your legacy for years to come.