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

The Preferred Legacy National Trust Bank

Family Stewardship

Fiduciary Services

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

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

Household Financial Management

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

At The Preferred Legacy National Trust Bank, stewardship is more than managing wealth—it's about creating a meaningful, lasting legacy that reflects your family's unique values and priorities. Our professionals provide personalized, conflict-free guidance, collaborating closely with your family and trusted advisors to ensure your legacy is secure for future generations.

We understand that every family's story is unique. By taking the time to understand your values and goals, we craft plans that reflect your vision while anticipating the needs of future generations. From financial assets to personal treasures and philanthropic contributions, we ensure every aspect of your plan is thoughtfully designed. Working alongside your family's accountants, attorneys, and other advisors, we create a seamless alignment of financial, estate, and tax strategies, delivering comprehensive solutions tailored to your family's needs.

Building a lasting legacy often involves creating a gifting plan that supports your family's goals while ensuring tax efficiency. Whether you wish to preserve wealth across generations or include philanthropy as part of your legacy, we help design strategies that maximize impact. For families interested in establishing a family foundation or supporting causes close to their hearts, we provide guidance that aligns with your mission, ensuring your contributions make a meaningful difference.

We also believe that a strong legacy depends on empowering future generations. By providing education and resources tailored to your family, we equip younger generations with the knowledge needed to navigate the complexities of wealth management. From foundational financial concepts to advanced stewardship strategies, we prepare your family to uphold and grow your legacy for years to come.

Trust is the cornerstone of everything we do. As a neutral partner free from conflicts of interest, we offer unbiased advice that prioritizes your best interests. We aim to protect your wealth while preserving the traditions and values that define your family's legacy.

Whether you are beginning to plan your legacy or refining an existing strategy, The Preferred Legacy National Trust Bank is here to help. Together, we will preserve your roots and grow your legacy for generations to come.