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

The Preferred Legacy National Trust

Bank 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

At The Preferred Legacy National Trust Bank, we value your time and energy. When it comes to finding a better solution for your financial situation, we understand how time consuming it can be to find the right answer for your unique circumstances. Our bank advisory program provides you with independent advice to help alleviate the stress of determining which banking services align with your goals and objectives . Our holistic and all-inclusive approach gives us the ability to work independently with any bank in your community to uncover the best rates for deposits and loans—all while bringing these opportunities directly to you, so you can spend more time focusing on what matters most.

With this kind of approach, your bank advisor can stay as involved in the process as you see fit. From the moment we are brought on board, our goal is to assist our clients from start to finish with both their personal and business banking needs. While some clients prefer that we remain as the primary contact to the bank, it's just as common for others to continue handling their day-to-day banking following the initial introduction. No matter the type of relationship you are interested in maintaining, we're able to leverage our expertise to provide you with a comprehensive solution that encompasses the nuances of your unique situation.

Our Preferred Legacy bank advisors offer peace of mind when it comes to knowing that you and your finances are in the best of hands that the market has to offer. Equipped with the highest-quality industry knowledge and wealth of experience, your Preferred Legacy bank advisor will work hand-in-hand with the bank of your choosing to keep your assets safe and secure, while you focus on preserving your roots to grow your legacy.