



## The Preferred Legacy National Trust Bank

# Trust and Estate Administration

### 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

The Preferred Legacy National Trust Bank provides comprehensive fiduciary services to help preserve your family's wealth for generations. Trusts serve various purposes, including avoiding probate, guiding fund distribution, and establishing a lasting family legacy. Our team ensures that trust assets are managed, invested, and distributed in strict accordance with the grantor's directives, safeguarding them for future generations.

When you choose The Preferred Legacy National Trust Bank as your trustee or executor, you gain a dedicated and impartial partner committed to meticulous administration. As an independent third-party trustee, we act in the best interests of your beneficiaries, upholding the grantor's wishes while minimizing risks and fostering harmony among heirs. Our neutrality ensures unbiased decision-making and equitable asset distribution, offering peace of mind to families during complex transitions.

Our approach is built on seamless collaboration with your trusted advisors, including attorneys and accountants, to create a cohesive wealth management plan tailored to your needs. This collaborative model not only enhances the effectiveness of your estate planning but often results in reduced fees, making it a cost-efficient choice for families seeking high-quality fiduciary services.

We specialize in managing all types of trusts, from living trusts to irrevocable trusts and special needs trusts, ensuring that your unique requirements are met with precision and care. Our team of experienced professionals, including attorneys and paralegals, handles even the most complex trusts with expertise and attention to detail. This, combined with our neutral position, allows us to fulfill our mission of preserving your legacy for generations to come.

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