



## Bank Advisory

# The Preferred Legacy National Trust Bank



### 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, our Bank Advisory Services are designed to simplify and enhance your financial management. We recognize the complexities of personal and business banking, and our independent, tailored guidance ensures that your financial decisions align with your long-term goals. Whether you are exploring loan options, optimizing cash flow, or planning for business expansion, our professionals work with a network of lending institutions to find the solution that best suits your needs.

Our Bank Advisory Services are flexible, adjusting to your preferences and level of involvement. Some clients rely on us to fully manage their banking relationships, while others seek strategic advice for specific transactions or financial decisions. No matter the level of engagement, we provide comprehensive, personalized solutions to address your unique financial circumstances.

In addition to standard banking support, our Bank Advisory Services focus on optimizing cash management, improving banking relationships, and evaluating financial products that serve personal and business needs. Our goal is to ensure that your banking strategies are efficient and aligned with your overall financial objectives.

At The Preferred Legacy National Trust Bank, we bring the expertise and resources needed to protect your assets and help you achieve financial success. By working closely with your chosen bank, we ensure your interests are prioritized. Whether securing a loan or maximizing your deposits, our team is dedicated to supporting your financial goals, allowing you to focus on building a lasting legacy.