



PREFERRED Legacy Trust

A DIVISION OF
CARR, RIGGS & INGRAM CAPITAL, LLC

The Preferred Legacy National Trust

Special Needs Trusts

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, our team understands that your situation is unique and may require its own distinct set of estate planning tools. Depending on the scenario, a special needs trust may be necessary to accomplish your goal of protecting a loved one. These trusts are often complex in nature, making it crucial to name a fiduciary who understands the intricacies of their inner workings.

The proper execution and administration of a special needs trust provides peace of mind to the grantors by empowering the fiduciary to determine the distribution of assets. This trust will also protect the beneficiary and preserve their eligibility for governmental benefits. In essence, the trust will allow the beneficiary to retain assets and still receive much-needed government assistance.

A qualified and knowledgeable fiduciary is vital to a special needs trust. The trustee will ensure that the terms of the trust are followed, which allows for the beneficiary's needs to be met while maintaining the eligibility for benefits. At The Preferred Legacy National Trust Bank, we have years of experience dealing with special needs trusts along with a variety of other estate planning matters. We have the compassion to be an effective resource for your loved one. At the same time, we know the rules, regulations, and processes to ensure matters aren't just done the correct way, but The Preferred way.