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

Special Needs Trusts

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

A special needs trust is crucial for safeguarding a loved one's financial future while ensuring continued eligibility for important government benefits, such as Supplemental Security Income (SSI) and Medicaid. These trusts are often complex, requiring a fiduciary who understands their unique structure and the intricacies of legal compliance.

Proper execution and administration provide peace of mind by allowing a fiduciary to manage asset distribution, maintaining the beneficiary’s continued eligibility for public assistance. This enables beneficiaries to cover expenses beyond what government programs typically provide, such as specialized medical equipment, therapies, education, and recreational activities.

Choosing the right fiduciary—one who is both knowledgeable and compassionate—is essential for effectively managing a special needs trust. At The Preferred Legacy National Trust Bank, we blend expertise with genuine empathy, fully understanding the unique challenges that families with special needs face. Our clients highly value this compassionate approach, knowing that every decision is made with their loved one's best interests in mind.

We have extensive experience administering these trusts and are dedicated to providing personalized care and support. Our role as trustees includes managing distributions to benefit the individual while remaining compliant with all applicable laws. We work closely with your team of advisors to offer tailored solutions that protect your loved one’s financial security and well-being.

With a steadfast commitment to compassionate and precise trust administration, The Preferred Legacy National Trust Bank manages every aspect of your special needs trust with care and expertise, upholding our promise to protect your loved one's financial future—the Preferred Way.

The Preferred Legacy National Trust Bank is a subsidiary of Preferred National, Inc., a subsidiary of CRI Advisors, LLC.