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

The Preferred Legacy National Trust

Household Finance Management

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

The Preferred Legacy National Trust Bank offers full-spectrum household financial management services that are truly customized to meet your family's unique needs. Our advisors can assume the clerical responsibilities of daily household finance—from paying monthly and annual bills to working with household staff, coordinating insurance coverage, and managing all household activity.

Beyond the administrative daily household management tasks, our team of advisors is also equipped in coordinating special purchases—from fine art to homes and vehicles, as well as planning travel. Our Real Estate Advisory services also guarantee your property management is operating efficiently, and we will work hand-in-hand with your realtor to establish a successful plan when buying or selling real estate.

The Preferred Legacy National Trust Bank advisors can also help you navigate the challenges that inevitably arise from changing circumstances and financial needs as your family members grow and age. With our advisors by your side handling your household financial management, you can focus on what counts—preserving your roots to grow your legacy.