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

The Preferred Legacy National Trust

Family Stewardship

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

Here at The Preferred Legacy National Trust Bank, we recognize the importance of leaving a lasting legacy. Coordinating finances and wealth strategies with families is a top priority; a priority in which we choose to give the utmost care and effort. Our advisors work tirelessly to assist your family by operating as a cohesive unit to better understand the process of gifting, family asset allocation, and the direction in which you see your family plan evolving. Our services range across the full spectrum of planning, from financial assets to your most treasured personal assets.

When the time comes to determine a gifting plan for your family, our Preferred Legacy National Trust Bank advisors will work with you to plan the most tax-effective strategy for your estate. Our goal is to provide long-lasting and tailored multi-generational support so your family is adequately taken care of in the future. In alignment with what the first-generation desires, we also educate current and future generations in finance and philanthropy concepts. Our focus is on the unique needs of your family's financial situation while maintaining a close client relationship to avoid any worry of what the future may hold.

In instances where your gifting plan includes charitable and philanthropic giving, The Preferred Legacy National Trust Bank delivers fully-vetted and sound advice to ensure that you are utilizing the most tax-efficient methods. If your desired legacy includes a family or donor foundation, we work to create a foundation closely matching the core mission and values of your family. When your advisor is focused on every aspect of your family's unique needs, you have the peace of mind knowing that you are actively preserving your roots to grow your legacy.