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

Preferred Legacy Trust

Estate and Trust Administration

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

Families create trusts for a myriad of reasons—to avoid probate, to designate how funds are spent, and to create a family legacy. The family designated trustee must uphold, invest, and distribute the property held by the trust, and is required to closely follow the directives in managing your trust and estate's day-to-day responsibilities. Most clients find a benefit in creating a trust due to a unique family situation, when they are no longer able to manage their own affairs, or when they want their legacy to last beyond their life span.

At Preferred Legacy Trust, our experienced staff of trust experts administer your trust and distribute your estate at your direction. Our trustees can aid your beneficiaries in making decisions necessary to maximize investments and tax benefits. As a trustee, Preferred Legacy Trust Company is in an ideal position to act as an independent third-party, serving as an unbiased decision maker among heirs, upholding the wishes of the grantor, mitigating risk amongst beneficiaries, and ensuring a smooth transition of the estate.

Should you choose Preferred Legacy Trust Company as your trustee and executor, rest assured knowing that our staff will work directly with your team of trusted advisors. From attorneys to accountants, experience shows that this type of collaboration often results in efficiencies and a well-organized and executed estate plan. Our trust experts are also able to integrate your customized trust and estate solutions into your overall wealth management plan.

Our Preferred Legacy Trust Company experts can tackle any type of trust, from living trusts, to irrevocable trusts and special needs trusts. Your estate and trust administration will be completed by experienced attorneys and trust professionals who possess many years of industry knowledge. We are uniquely positioned to oversee your estate, and this neutrality helps us deliver on our primary goal: preserving your legacy for generations to come.