



# PREFERRED Legacy Trust

A DIVISION OF  
CARR, RIGGS & INGRAM CAPITAL, LLC

## Preferred Legacy Trust

## Domestic Asset Protection Trust

### 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

In 2013, Ohio became the 14th state to adopt a Domestic Asset Protection Trust (DAPT), providing individuals with the ability to protect their life savings from creditors and litigation. This DAPT, known as the Ohio Legacy Trust, is an estate planning tool created to offer comfort in a world filled with constant litigation. The DAPT in Ohio is thought to have some of the most substantial safeguards in the United States, providing more protection than Delaware, South Dakota, Alaska, and Nevada.

DAPTs are commonly used by doctors, business owners, lawyers, accountants, directors of publicly traded companies, or anyone whose occupational roles put them at risk of a lawsuit. A DAPT can also be used in place of a prenuptial agreement, as long as the trustee is established in the state of Ohio.

As an Ohio corporate trustee, Preferred Legacy Trust Company works with your attorneys and you, the grantor, to establish a DAPT, determining what assets belong in the trust, while also developing precautions to aid in protecting assets from an aggressive litigant.

A DAPT is only as effective as its trustee. Preferred Legacy Trust Company has a solid foundation of experience and partnerships with some of the best estate planning attorneys in the industry to protect your assets for generations. As an Ohio-based trust company, we will walk alongside you through the process of establishing one of the most robust DAPTs available as a part of your estate plan, allowing you to preserve your legacy for generations to come.