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

The Preferred Legacy National Trust Bank

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

Managing family wealth is a complex endeavor that demands an integrative approach. At The Preferred Legacy National Trust Bank, we specialize in providing cross-functional expertise tailored to the unique requirements of high-net-worth families and individuals. Whether guiding your charitable gift-giving, developing a private investment strategy, or managing your estate and trust administration, we are committed to deeply understanding your family's dynamics. This commitment allows us to scale our services to meet the specific goals and needs of each family member.

Our services are designed to relieve you of the intricate administrative tasks associated with wealth preservation, enabling you to focus on what truly matters: creating the life you envision while ensuring that your legacy endures for generations to come.

By entrusting your wealth management and legacy planning to The Preferred Legacy National Trust Bank, you gain the confidence that your family's future is secured with the utmost care and expertise. With The Preferred Legacy National Trust Bank, you are assured a partnership that not only meets your financial goals but also preserves your family’s legacy, securing a lasting impact for future generations.