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

The Preferred Legacy National Trust Bank

Family Business Advisory

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 a family business presents a unique set of challenges that often intertwine personal relationships with professional responsibilities. These complexities can create situations that non-family businesses rarely encounter. For family business owners, the demands of daily operations often take precedence, leaving little time to address critical long-term strategies until unforeseen circumstances demand immediate action. Whether considering succession planning, evaluating a purchase offer, or navigating family dynamics within the business, having a trusted professional can make all the difference.

At The Preferred Legacy National Trust Bank, we provide tailored advisory services to family businesses, addressing their distinctive needs with expertise and care. As part of CRI's Family of Companies, our professionals bring an unmatched network of resources to help identify and strengthen your business's core areas. From financial consulting and succession planning to transaction assistance, we partner with you to create solutions that align with your goals. Every relationship we establish is designed to empower you to make informed decisions that secure the future of your business and family.

Our professionals understand that family businesses are not just about profits but about preserving legacies and fostering connections across generations. This is why we take a holistic approach to advisory services. Our team considers every facet of your business, from financial performance to family dynamics, offering proactive planning that alleviates stress and prevents potential challenges from becoming crises. Whether you need to raise capital through innovative debt solutions, plan the optimal time to sell or merge, or ensure a seamless leadership transition, we walk alongside you every step of the way.

With decades of experience supporting family businesses, our team combines industry knowledge with a deep appreciation for the intricacies of family dynamics. Our goal is to provide clarity and confidence, enabling you to focus on growing your business and safeguarding your legacy for future generations. By proactively addressing your needs, we help eliminate the uncertainty that often accompanies critical decisions, allowing you to direct your energy toward building a thriving enterprise.

Let us help you achieve peace of mind by addressing today's challenges with foresight and expertise. Together, we can secure the future of your family business and strengthen the legacy you've worked so hard to build.