WELCOME TO

The Preferred Legacy National Trust Bank

PRESERVE YOUR ROOTS. GROW YOUR LEGACY.

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

PreferredLegacy.com

The Preferred Legacy National Trust Bank

At The Preferred Legacy National Trust Bank, we understand that preserving your family's legacy encompasses much more than safeguarding financial wealth—it's about immortalizing your family's stories, achievements, and values for future generations. Our mission extends beyond the mere transmission of knowledge; it's a promise to ensure the longevity of your legacy through thoughtful stewardship and wealth management.

Navigating the complexities of wealth preservation requires a bespoke approach, one that harmonizes the administrative facets of wealth management with the nuances of your family's unique story. Our network of seasoned professionals is dedicated to offering personalized planning and advisory services, underpinned by a deep commitment to family stewardship, philanthropy, and comprehensive household finance management.

By fostering collaborative relationships with you and your trusted advisors, we tailor our services to address every facet of your legacy—from business planning and real estate advisory to philanthropic strategies and private investment management. Our goal is to provide you with the peace of mind and freedom to focus on living the life you envision, secure in the knowledge that your legacy will be preserved and cherished for generations to come.

With The Preferred Legacy National Trust Bank as your partner, you're not just managing wealth; you're crafting a legacy that transcends time, benefiting your family and the generations that follow.

Services

Fiduciary Services

- Trust & Estate Administration
- Retirement Plans Trustee

Comprehensive Family Planning & Advisory Services

- Bank Advisory
- Family Business Advisory
- Private Investment Advisory
- Trust & Estates

Family Stewardship & Philanthropy

- Charitable giving
- Family & Donor Foundation Advisory
- Family Education
- Private Investment Advisory
- Trust & Estates

Household Financial Management

- Advance Bill Payment
- Concierge Services
- Financial Reporting
- Household Payroll
- Real Estate Advisory

Fiduciary Services

At The Preferred Legacy National Trust Bank

Trust and estate administration are cornerstones of safeguarding family wealth for future generations. Our fiduciary services offer comprehensive management and legal responsibility for your trust, ensuring your estate is administered with care, impartiality, and in accordance with your wishes. From revocable and irrevocable trusts to special needs trusts, our team is equipped to handle the complexities of your estate with sensitivity.

Trust and Estate Administration

The Preferred Legacy National Trust Bank specializes in Trust and Estate Administration, ensuring your family's trusts are managed with the utmost care and precision. Our experienced team guides the distribution of your estate, maximizes tax benefits, and acts as an unbiased mediator among heirs. Whether managing living trusts, special needs trusts, or ensuring smooth estate transitions, our goal is to preserve your legacy meticulously, respecting your wishes every step of the way.

- **Charitable Trusts**
- **Domestic Asset Protection Trusts**
- **Estate Settlement**
- **Insurance Trusts**
- **Irrevocable Trusts**
- **Revocable Trusts**
- **Special Needs Trusts**
- **Testamentary Trusts**

Domestic Asset Protection Trust (DAPT)

Our Domestic Asset Protection Trust services offer robust protection for your assets against creditors and litigation. As pioneers in utilizing Ohio's favorable DAPT laws, we provide strategic asset protection planning, ensuring your wealth is safeguarded. Our team of professionals collaborates with you and your legal advisors to establish a DAPT that fits your needs, offering unparalleled security and peace of mind.

Special Needs Trusts

Special Needs Trusts are crafted with care to support loved ones with disabilities, ensuring they retain essential government benefits while benefiting from trust assets. Our knowledgeable team understands the complexities involved, offering tailored solutions that provide for your loved one's needs without compromising their support systems.

Comprehensive Family Planning & Advisory Services

At The Preferred Legacy National Trust Bank

Navigating family dynamics in estate planning can be complex. The Preferred Legacy National Trust Bank brings impartial, knowledgeable advice to ensure a clear understanding and emotional balance throughout the process. Working closely with legal advisors, we guide you through crafting a robust estate plan, securing your legacy, and providing a foundation for future generations.

- **Bank Advisory**
- **Family Business Advisory**
- **Private Investment Advisory**
- **Trust and Estates**

Bank Advisory

Understanding the right banking services for your unique needs can be daunting. Our Bank Advisory service simplifies this process, offering independent, customized advice. We work tirelessly to find the best rates and services, allowing you to focus on what truly matters. Whether you seek hands-on guidance or independent management, our advisors are committed to finding the optimal banking solutions for you.

Family Business Advisory

Family businesses face unique challenges distinct from their non-family counterparts. From succession planning to evaluating purchase offers, The Preferred Legacy National Trust Bank provides strategic advisory services tailored to the unique needs of your family business. Leveraging our extensive network, we identify opportunities and strategies to support the growth and transition of your legacy.

Family Stewardship & Philanthropy

At The Preferred Legacy National Trust Bank

- **Charitable giving**
- **Family & Donor Foundation Advisory**
- **Family Education**
- **Family Gifting**
- **Family Meeting**

Understanding the importance of a lasting legacy, The Preferred Legacy National Trust Bank prioritizes the integration of family financial strategies with a deep commitment to stewardship and philanthropy. Our advisors dedicate themselves to assisting families in navigating the complexities of asset allocation, gifting, and philanthropic endeavors, ensuring a cohesive approach tailored to your family's vision and values.

Our comprehensive services span from financial planning to the safeguarding of personal treasures, always with a focus on tax-efficient strategies and multi-generational support. We emphasize education on finance and philanthropy for both current and future generations, aligning with the founding generation's desires to prepare adequately for the future.

For families inclined towards charitable giving, we provide advice on tax-efficient methods and foundation creation that resonate with your family's mission. With our tailored, family-oriented services, you gain the assurance of preserving and growing your legacy, knowing every aspect of your family's unique needs is meticulously addressed.

Family & Donor Foundation Advisory

The Preferred Legacy National Trust Bank's Family & Donor Foundation Advisory service focuses on transforming your philanthropic vision into an impactful reality. Recognizing each family foundation's unique ambitions and dynamics, we offer tailored advisory services. We manage all aspects, from distribution and tax compliance to aligning your foundation's structure with your charitable interests. By easing administrative burdens, we enable families to perpetuate their philanthropic passions and legacy, ensuring impactful and tax-efficient philanthropy that resonates with your values across generations.

Professional Trustee for Retirement Plans

At The Preferred Legacy National Trust Bank

In an era where retirement plans are essential, our Professional Trustee services ensure your employee benefits are managed effectively, adhering to ERISA standards and optimizing plan performance. We navigate the complexities of plan administration, reducing risk and enhancing benefits for both employers and employees.

- **ERISA Plans**
- **Individual Retirement Plans**

Self-Directed IRAs

Our Self-Directed IRA service empowers you to diversify your retirement investments beyond traditional stocks and bonds. With our guidance, you can invest in real estate, private companies, and more, leveraging our expertise to manage your investments wisely while adhering to IRS regulations.

Household Financial Management

At The Preferred Legacy National Trust Bank

Our Household Financial Management service is designed to seamlessly integrate into your life, providing comprehensive management of your daily financial operations. This includes everything from bill payments and staff coordination to overseeing significant acquisitions and real estate transactions. Our advisors offer personalized attention to manage and optimize your household's financial activities, ensuring every detail is handled with precision. By entrusting us with the intricacies of your financial management, you are free to focus on the essential aspects of life and legacy building, secure in the knowledge that your household's financial affairs are in capable hands, tailored to your family's evolving needs and goals.

- **Advance Bill Payment**
- **Concierge Services**
- **Financial Reporting**
- **Household Payroll**
- **Real Estate Advisory**

The Preferred Legacy National Trust Bank

The Preferred Legacy National Trust Bank is committed to you and your family's future. Our dedication to preserving your legacy and enhancing your financial well-being is at the heart of everything we do. Together, we can create a lasting impact that transcends generations, ensuring that your vision for the future is not just realized but flourished.

Thank you for considering us as your trusted partner in this journey.

Get in Touch

We invite you to begin the conversation about your estate planning and wealth management needs. Our team is ready to provide the personalized attention and expertise you deserve.

Phone

(330) 462-7130

Email

info@PreferredLegacy.com

Website

PreferredLegacy.com