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

The Preferred Legacy National Trust Bank

Household Finance Management

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

Household Financial Management with The Preferred Legacy National Trust Bank offers a tailored and comprehensive solution to meet your family's financial needs. Our advisors manage the essential day-to-day financial tasks, such as paying bills, coordinating with household staff, and ensuring proper insurance coverage. This seamless approach to Household Financial Management ensures that your household's financial operations run efficiently, freeing you to focus on more important priorities.

Beyond handling routine tasks, we provide support for significant financial decisions, including facilitating purchases of fine art, vehicles, and real estate. Our Real Estate Advisory services help ensure that your property is managed effectively and in line with your financial objectives. We collaborate closely with realtors and other professionals to guide you through buying or selling properties, making sure the process is smooth and strategically aligned with your goals.

As your family's needs evolve, The Preferred Legacy National Trust Bank adjusts to these changes, offering continuous guidance and support throughout various stages of life. Whether you are managing financial responsibilities for a growing family or providing care for aging relatives, our Household Financial Management services adapt to help you navigate these transitions with confidence.

From managing bills and household payroll to overseeing real estate transactions, we ensure that your household's financial matters are handled efficiently and with care. By choosing The Preferred Legacy National Trust Bank for your Household Financial Management, you can focus on building a legacy for future generations while leaving the complexities of financial management to us.