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

The Preferred Legacy National Trust Bank

Self-Directed IRA

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

At The Preferred Legacy National Trust Bank, our Self-Directed IRA services offer the flexibility and control needed to diversify your retirement portfolio. Unlike traditional IRAs that limit investments to stocks, bonds, and mutual funds, a Self-Directed IRA allows you to invest in a wider range of alternative assets such as real estate, private equity, and LLCs. This broader scope of investment options empowers you to create a retirement strategy that aligns with your unique financial objectives.

Our Self-Directed IRA services focus on seamless account management. As a non-discretionary custodian, The Preferred Legacy National Trust Bank takes care of the administrative and custodial duties while you retain full control over your investment decisions. We ensure compliance with IRS regulations, safeguarding your account's tax-deferred status without offering investment advice or promoting specific assets.

With The Preferred Legacy National Trust Bank, you can trust that all aspects of your Self-Directed IRA will be managed efficiently. This includes executing your investment instructions, handling contributions, transfers, and rollovers, managing tax reporting, and administering the purchase, sale, or liquidation of assets. We also provide timely and accurate IRA statements, keeping you informed about the status of your investments.

Our team’s expertise ensures that you remain compliant with the complex rules governing Self-Directed IRAs, including regulations on prohibited transactions and disqualified persons. We collaborate with your accountants, attorneys, and financial advisors to streamline both the setup and ongoing administration of your account, allowing you to focus on maximizing your retirement wealth.

Whether you are investing in real estate, private companies, or other alternative assets, our Self-Directed IRA services provide the support you need to make informed decisions while growing your retirement portfolio.

The Preferred Legacy National Trust Bank, LLC is a division of Carr, Riggs & Ingram, L.L.C. “CRI" is the brand name under which Carr, Riggs & Ingram, L.L.C. (“CPA Firm”) and CRI Advisors, LLC (“Advisors”) and its subsidiary entities provide professional services. CPA Firm and Advisors (and its subsidiary entities) practice as an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable law, regulations and professional standards. CPA Firm is a licensed independent CPA firm that provides attest services to its clients, and Advisors and its subsidiary entities provide tax and business consulting services to their clients. Advisors and its subsidiary entities are not licensed CPA firms.