



# PREFERRED Legacy Trust

A DIVISION OF  
CARR, RIGGS & INGRAM CAPITAL, LLC

## Preferred Legacy Trust

### Professional Trustee for 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

#### Fiduciary Services

- Trust & Estate Administration
  - Revocable Trusts
  - Irrevocable Trusts
  - Charitable Trusts
  - Domestic Asset Protection Trusts
  - Estate Settlement
  - Insurance Trusts
  - Testamentary Trusts
- Retirement Plans Trustee
  - ERISA Plans
  - Individual Retirement Plans

#### Household Financial Management

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

In this day and age, offering a retirement plan to your employees isn't only a benefit—it's an expectation. Offering a retirement plan often helps with overall employee retention and satisfaction, but unfortunately can also come with risk to you and your company should litigation from a past employee or beneficiary arise.

Enlisting a professional trustee who strictly adheres to the Plan objectives and directives is essential. A self-trusted plan's administrator assumes all risk and liability in following Plan directives, whereas a professional trustee leverages their experience to make effective changes to the Plan that benefit employees and employers alike.

At Preferred Legacy Trust Company, our professional trustees have experience with a variety of types of plans. We stay up-to-date on laws, ever-changing regulations, and new compliance guidance in order to partner with you to better serve your employees. Our trustees keep employers on track to reach ERISA deadlines for IRS filings, required notices for participants, and plan amendments. Should our professional trustees accept investment management responsibility, then we will also oversee the investments in the Plan to ensure that funds are performing according to their designated fund objective.

Preferred Legacy Trust Company's professional trustees allow you the peace of mind that your plan is managed properly, giving you the ability to spend your time efficiently running your business while creating a legacy for yourself and your employees.