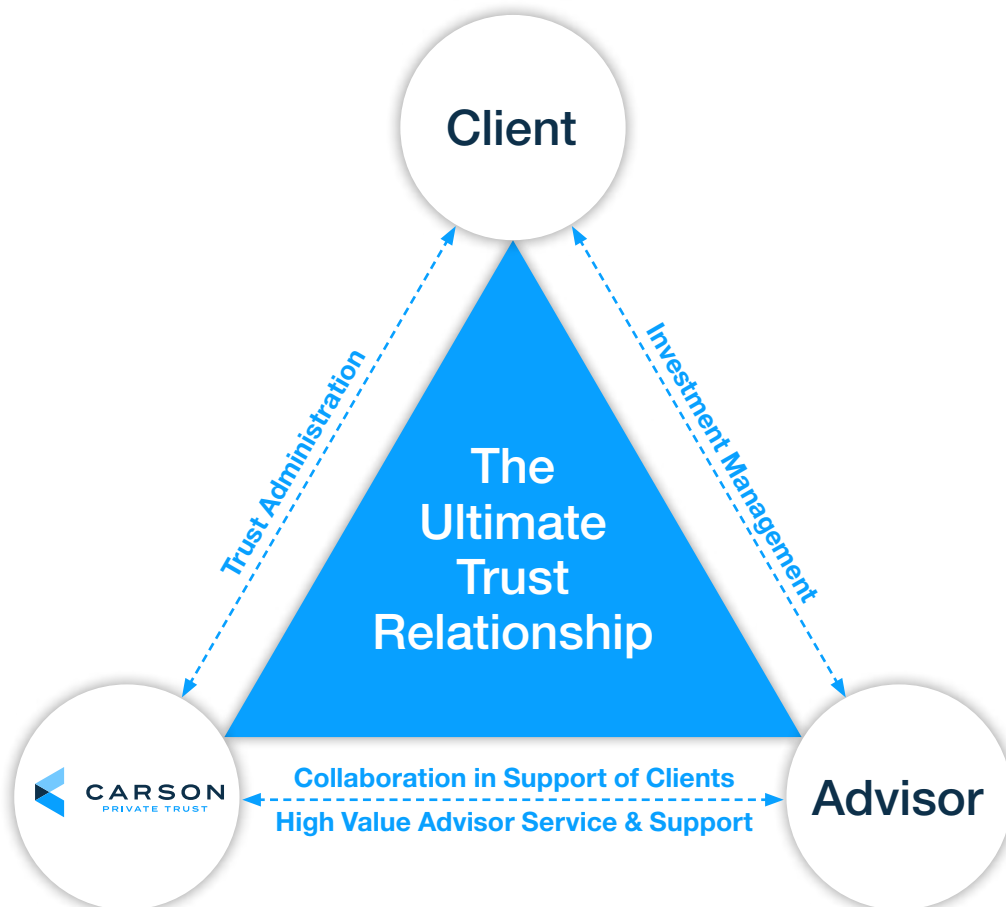


Carson Private Trust

A Locally Managed Trust Service

By working with our nationally-chartered trust company, Carson Private Trust delivers a comprehensive, locally-managed trust services solution.

- » **Experienced:** Retain your advisor as the investment advisor while gaining access to the talented, experienced trust professionals from Carson Private Trust.
- » **Cost Effective:** Benefit from trust services provided in a cost-efficient manner with a competitive fee structure.
- » **Flexibility:** Opt to work with co-trustees by sharing administrative responsibilities to work towards the objectives of the trust and meet the needs of the beneficiaries.
- » **Local Support, National Coverage:** Minimize disruption by working with your trusted advisor with trust administration supported by Carson Private Trust, a federally-chartered trust company.



Building A Strong Foundation

Carson Private Trust provides trust solutions for clients whose financial, family or business needs require the services of a professional fiduciary. Carson Private Trust is a Trust Representative Office of National Advisors Trust Company, FSB, the largest federally-chartered trust company created by registered investment advisors for the benefit of their clients.

Estate Planning Attorney

- » Works with the client to recommend and establish the appropriate trust
- » Appoints your wealth advisor's firm as the investment advisor and Carson Private Trust as corporate trustee, co-trustee or agent for trustee

Your Advisor

- » Manages the investments in accordance with the trust document while incorporating tax and estate planning strategies
- » Oversees the relationship between you and Carson Private Trust

Carson Private Trust

Performs fiduciary trust administration duties in accordance with the trust document, such as:

- » Disbursements
- » Tax reporting
- » Statement production
- » Bill paying
- » Principal and income accounting

**Contact to learn more
about Carson Private Trust**



Sarah Duey, JD, CTFA, CAP®, AEP®

Vice President, Trust Services

Carson Private Trust

402.315.5866

sduey@carsongroup.com

This summary is not intended to provide specific legal, tax, or other professional advice. For a comprehensive review of your personal situation, always consult with a tax or legal advisor. Carson Private Trust is a Trust Representative Office of National Advisors Trust Company (NATC) and National Advisors Trust of South Dakota (NATSD). Carson Partners and NATC and NATSD are separate and unaffiliated companies and are not responsible for each other's policies and services. Investment advisory services offered through CWM, LLC, an SEC Registered Investment Advisor.



CARSON
PRIVATE TRUST

Carson Group
14600 Branch St.
Omaha, Nebraska 68154

carsongroup.com
888.321.0808
info@carsongroup.com