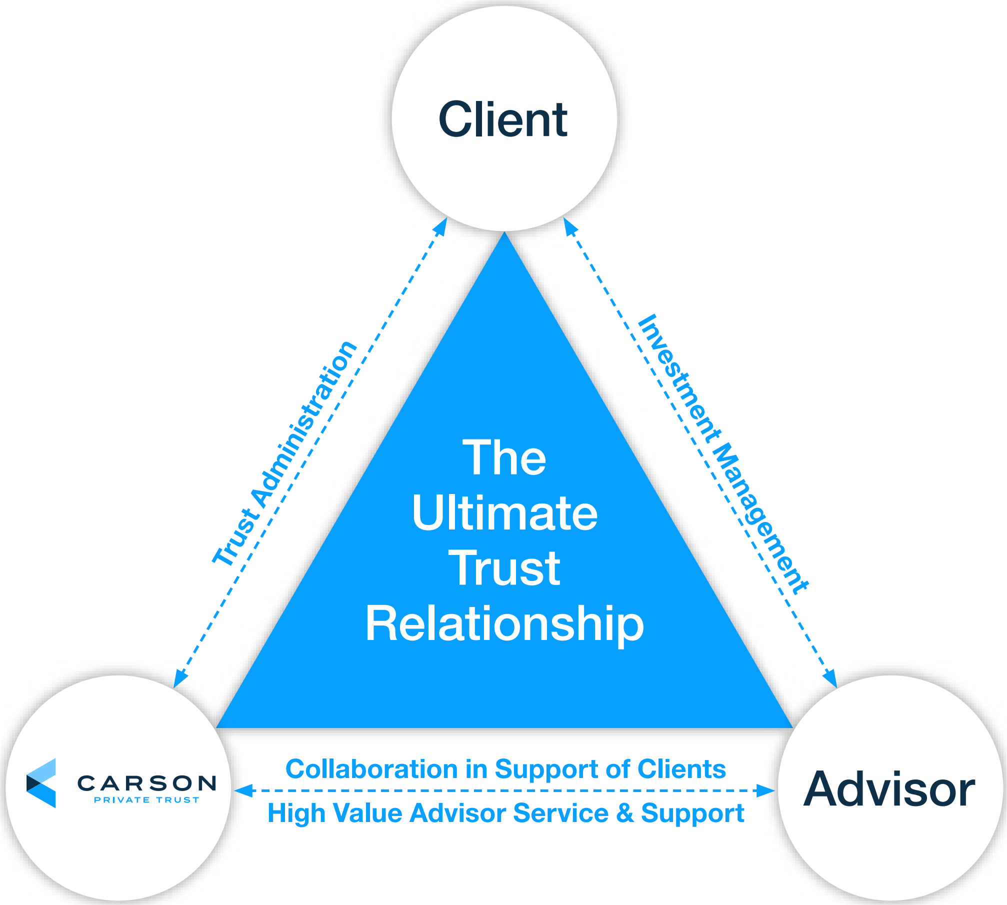
Carson Private Trust

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

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