

NATIONAL
ADVISORS
T R U S T



Independent, Objective Trust and Custody Solutions



Service

National Advisors Trust sets the standard of excellence in trust and custodial services.

The mission of National Advisors Trust Company, FSB is clear:

To support trusted advisors and their clients with independent, objective trust and custodial solutions.

National Advisors Trust provides first-class trust and custodial services with professional attention delivered at favorable costs. With its strong and growing asset base, the company is one of the largest independent trust companies in the nation.

Clients of National Advisors Trust are assured they will receive responsive service and attention to detail while maintaining the trusted relationship and wealth management strategy built with their financial advisor.

Not just for today, but for generations to come.

National Advisors Trust delivers a full range of services including:

Trust Services

- ▲ Revocable Trusts
- ▲ Charitable Trusts
- ▲ Irrevocable Life Insurance Trusts
- ▲ Special Needs Trusts
- ▲ Irrevocable Trusts
- ▲ Institutional Trusts
- ▲ Agent for Trustee

Custodial Services

- ▲ Securities safekeeping
- ▲ Income collection from securities
- ▲ Settlement of securities trades as directed
- ▲ Payment of funds, when directed
- ▲ Timely statement delivery

Retirement Plan Services

- ▲ IRAs: Custodian or Trustee
- ▲ Defined Benefit Plans
- ▲ 401(k): Daily Valuation Platform
- ▲ Defined Contribution Plans
- ▲ Roth 401(k) inside a 401(k)



Security

National Advisors Trust gives you the confidence of knowing your assets are protected by a federally-chartered trust company.

National Advisors Trust is regulated by the Office of the Comptroller of the Currency (OCC), a bureau of the U.S. Treasury Department, and is authorized to do business in all 50 states. It is a member of the Federal Deposit Insurance Corporation (FDIC). By law, client assets are segregated from the capital assets of National Advisors Trust and are not subject to potential creditor claims against the Trust Company.

As an independent trust company, our primary responsibility is to ensure the safe-keeping of your investment assets. We have built our reputation for security on this foundation of safety and stability.

National Advisors Trust has built a solid financial institution that brings independence, security and trust to clients.

National Advisors Trust ascribes to the highest standards of service as set forth in ISO 9001:2000—an international measure focused on quality management systems and continuous improvement of product/service delivery.



*Certified to the ISO 9001:2000 Standard
Certificate # FS 93294*

An International Measure of Quality Management Systems and Processes

National Advisors Trust Company, FSB, ("National Advisors Trust") is a wholly owned subsidiary of National Advisors Holdings, Inc., a Delaware Corporation. The shareholder advisory firms of National Advisors Holding, Inc. each hold less than a ten percent (10%) ownership interest in the company.

Trust

National Advisors Trust understands and respects your relationship with your financial advisor.

Your financial advisor has unique insight into your needs and expectations. Many clients prefer the professional guidance and confidentiality of their financial advisor, and are reluctant to involve a large impersonal financial institution for trust and custodial services. The advisors who created National Advisors Trust built an independent trust company that respects and supports the client-advisor relationship.

With National Advisors Trust, you maintain the relationship you have with your financial advisor, while benefiting from the service of a federally-chartered trust company. There is no need to change your investment philosophy, asset management style or portfolio holdings. You may also maintain your attorney, accountant or other professional relationships.

National Advisors Trust was founded by independent, innovative financial advisory firms to serve their clients.

Mission Statement

To support trusted advisors and their clients with independent, objective trust and custodial solutions.



www.NationalAdvisorsTrust.com

National Advisors Trust Company, FSB

10881 Lowell Avenue, Suite 100 Overland Park, KS 66210 Tel: 913-498-8159 Fax: 913-498-0798