

National Advisors Trust Chosen by Apex Financial Advisors to Establish a Trust Representative Office

Apex joins National Advisors Trust and implements TRO program to offer expanded trust and trustee services to clients.

Overland Park, KS (May 1, 2012) – National Advisors Trust, the nation’s largest independent, RIA-owned trust company, today announced that Apex Financial Advisors, Yardley, PA, has become the trust company’s newest shareholder firm and also the trust company’s latest Trust Representative Office™ (TRO).

“Becoming a shareholder provides us with access to the TRO program, which establishes Apex as a Trust Representative Office of National Advisors Trust supported by a unique trust services marketing program. Being a TRO expands our ability to offer a range of valuable trust services to our clients, and at the same time helps position our firm with Centers of Influence (COI) who can refer trusts and high-net-worth clients to Apex,” said Robert A. Connell, CEO of Apex Financial Advisors. “After reviewing a number of trust alternatives, even contemplating starting a trust company ourselves, we chose National Advisors Trust because they have a deep understanding of our business and can support us with unique programs and options designed specifically for RIAs. We also see a strong benefit in connecting and networking with the National Advisors’ shareholder community of RIAs and participating with them in the trust company’s study groups and conferences.”

The TRO program is a marketing program that enables investment advisors to offer a full range of trust and trust custody services to clients, with administrative services provided by National Advisors Trust. National Advisors Trust supports RIA firms with proactive marketing programs, and provides a steady flow of trust education and ongoing marketing campaigns targeting COI. The TRO program assists advisors with positioning their firms as being trust knowledgeable and trust savvy, and generates referrals with COI in their respective communities.

According to Ron Ferguson, CEO of National Advisors Trust, “Apex is at the forefront of the movement by RIAs to increase their knowledge of trust services and to integrate those services into their practice. Firms like Apex are looking to fulfill their clients’ requests to help manage their assets into the future and work with their children and families when they are gone. As a breakaway broker, Robert Connell founded Apex with the clear vision to focus on clients’ needs and provide the highest standard of care with comprehensive financial planning and wealth management services. By joining National Advisors Trust and implementing the TRO program, Apex is staying true to their vision and expanding their services with new options that will help preserve and build clients’ wealth.”

About Apex Financial Advisors

Apex Financial Advisors is dedicated to preserving and building clients’ wealth. Founded by Robert Connell, one of the first Certified Financial Planners® (CFPs) in the country, Apex focuses on understanding clients’ financial needs through customized ongoing analysis and planning. The company’s ultimate goal is to provide personal financial stability for clients and their families. Apex has a passion for its work and assisting its clients. The company takes pride in what it does, and goes to great lengths to know its clients and understand their individual financial lives. Each client receives

personalized and customized financial planning and implementation that utilize advanced wealth-building strategies to help them navigate the evolving demands of family, business, taxes and life issues. Apex Financial Advisors is a Registered Investment Advisor (RIA) with the Securities and Exchange Commission (SEC). For more information on Apex, visit www.afa-inc.com.

About National Advisors Trust

National Advisors Trust Company, FSB, is a federally chartered trust company with assets of more than \$7.5 billion. Founded in 2001, it is the largest independent, RIA-owned trust company in the nation, and is authorized to do business in all 50 states. The company provides a broad range of trust and custody services uniquely designed and positioned for clients of an RIA, including; an advanced, multi-custodian investment management platform, trust accounting services, referral marketing programs, trust education programs, practice management programs, economies of scale, and other related services to advance the success of participating RIA firms and their clients. National Advisors Trust is a “trust only” organization focused on trust and custody services for RIA firms and is not involved in lending and depository banking functions. For more information on National Advisors Trust, visit www.nationaladvisorstrust.com.

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National Advisors Trust

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