National Advisors Trust Chosen by Carlson Capital Management to Provide Branded Trust Services

Carlson Capital Management implements National Advisors' Trust Representative Office program. New private-labeled trust services brand formed, Carlson Trust.

Overland Park, KS (February 5, 2013) – National Advisors Trust, the nation's largest independent RIA-owned trust company, announced that it has been selected by Carlson Capital Management (CCM) to provide comprehensive trust services through National Advisors' Trust Representative Office (TRO) program. As part of the TRO program, National Advisors established Carlson Trust, a private-labeled trust services brand through which CCM will market trust-related services.

Justin D. Stets, Principal of Carlson Capital Management, commented, "Our firm has been in the space of delivering trust services to clients for more than ten years. Our new relationship with National Advisors Trust ensures that our clients will continue to receive the investment advisory and wealth management approach they have come to expect from us, integrated with an enhanced trust services experience that National Advisors brings to the table with their high quality fiduciary and administrative standards. For us, this equates to a best in class experience for our clients."

CCM expects to use the new branded trust services to help grow their business, and will be engaging independent legal and accounting professionals to explore ways to deliver the experience to more individuals and families.

"The TRO program is important in helping us respond to increasing demand from clients for trust and trustee services, and the growing need to deliver services that enable us to maintain multigenerational relationships that transition into the future," continued Stets. "The TRO program allows us to build on our strong, reputable brand with branded services through Carlson Trust, which is a great advantage and market differentiator."

According to Cindy Ralls, Vice President of Marketing for National Advisors Trust, "Some of the top issues facing RIAs are trusts and trust services, which are becoming increasingly important to advisors serving an aging clientele that is preparing to transition their assets to the next generation. If advisors are not named in a trust document, there is a high probability that the assets they are managing today will walk down the street to the local bank or pass to the next generation without their involvement. The TRO program addresses those issues, and also provides branded marketing support to help advisors leverage and build their brand and draw new clients."

About the TRO Program

The TRO program is a trust marketing program that allows advisors to offer a full range of trust and trust custody services to their clients under private label branding, with administrative services provided by National Advisors Trust. National Advisors Trust supports participating RIA firms with a proactive marketing program, and provides a steady flow of trust education with ongoing marketing campaigns. The TRO program assists advisors with positioning for their firms, and generates referrals with COIs in their respective communities. Additionally, RIAs have the benefit of an active study group of other advisor firms who communicate regularly and share experience, information and strategies regarding the TRO program.

About Carlson Capital Management

Founded in 1987, Carlson Capital Management, Inc. is a comprehensive wealth management firm with Minnesota offices in Northfield, Hastings, Bloomington and Rochester. Managing more than $925 million in assets and serving a select group of 550 clients in Minnesota and throughout the country, CCM brings together in one place the key disciplines of investment, estate, tax, insurance, retirement and philanthropic planning to provide fully integrated wealth management. The firm serves financially established individuals and families, business owners and non-profit organizations. A fee-only structure provides clients with independent insight and an ethical, transparent relationship. For twenty- five years, Carlson Capital Management has been a trusted advisor for clients seeking competent advice and management of their financial lives. For more information on CCM visit www.carlsoncap.com.

About National Advisors Trust

National Advisors Trust Company, FSB, is a federally chartered trust company with more than $8 billion assets under administration referred by more than 135 RIA firms throughout the country. 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.

For more information contact:
National Advisors Trust
Corrine Smith
913-522-7284
csmith@nationaladvisorstrust.com