"Committing to your Financial Security"

Our Commitment

Old North State Trust has attracted professionals from banks, major brokerage houses, and institutional investors. These professionals all sought the freedom to focus on their clients rather than on a corporate agenda. Combining such diverse perspectives leads to more creative solutions for our clients.

At ONST, our primary commitment is to provide personal service tailored to the unique requirements of each individual client, regardless of their account size.

We are committed to establishing personalized, one-on-one relationships with all our clients in order to best serve their financial needs.

OLD NORTH STATE TRUST, LLC

Our Mission

Old North State Trust is a local company that is trustworthy and personalized in providing you financial services that will safeguard your legacy. Our primary focus is our service and relationship with you and listening to your needs and concerns. Our loyalty to you is based upon these three beliefs:

HERITAGE

RELATIONSHIPS

SOLUTIONS

Office Locations

Greensboro
Wilmington
Lexington
Greenville
Siler City

www.oldnorthstatetrust.com
336-646-ONST (6678)

A family ***heritage*** *of Trust*

An Independent Comprehensive Provider

OLD NORTH STATE TRUST

Trust & Estate Services

We pride ourselves on our ability to offer independent corporate Trustee services.

Our services include:

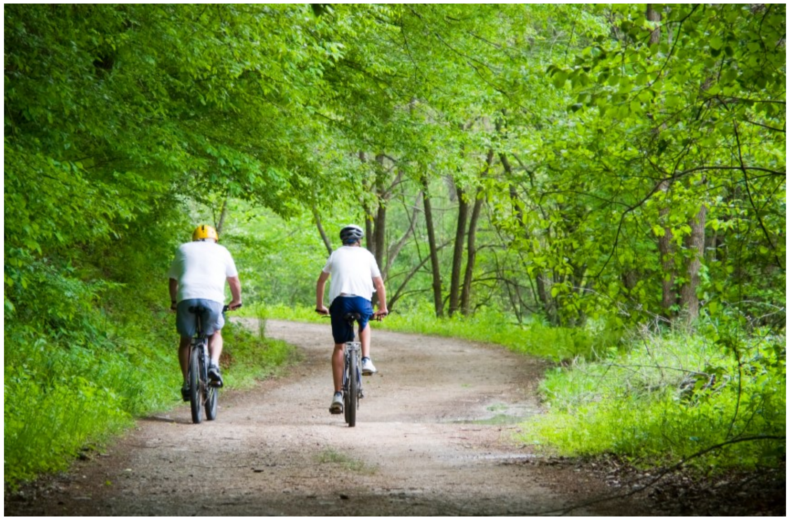
- Professional asset management
- Personalized, independent customer service
- Tax planning and preparation
- Estate and financial planning including the willingness to work with existing advisors
- Meeting with family members to discuss their needs
- Arranging to have sufficient funds for the family during probate
- Gathering and valuing estate assets
- Completing all filings required by Clerk of Court & verifying validity of claims
- Filing all accounting and tax returns, including final income tax, estate tax and fiduciary tax returns
- Distributing the assets in accordance with the terms of the governing instrument

Helping Grow and Protecting Your Wealth

Income, Estate and Trust Tax Consulting

We focus on family-owned and small companies and the issues specific to their businesses.

- Our emphasis is on planning, consulting and compliance
- Estate, gift and trust planning
- Retirement and financial planning
- Succession and ownership transfer planning
- Strategic planning and Entity selection
- Tax return planning and compliance
- Tax minimization of business sales



Asset Management

We at Old North State Trust strive to provide the highest quality investment advice with superior customer service.

Prudent- We seek to maximize returns for our clients while emphasizing the safety of principal by utilizing techniques to lower risk and volatility.

Objective- We are a fee based money manager with no proprietary products; therefore, we do not have the conflicts of interest faced by other managers.

Client Centered- We are relationship driven, not transaction driven. Our clients are individuals and businesses seeking to develop a relationship with a trusted advisor.

Focused- We have a time tested four-step process.

- Determine the client's goals and objectives including income needs and tax status.
- Determine the client's risk tolerance and time horizon.
- Select appropriate no load mutual funds, securities and ETF's utilizing a rigorous screening process.
- Conduct regular progress reviews with the client to make sure we are on track and to make any necessary changes.