



## Our Guarantees

- The Service you deserve with a local and independent firm.
- Complete Confidentiality and privacy with your information.
- Objectivity and transparency with no affiliation with other firms.
- Oversight of transactions for protection & validity.
- Provide decision making as an impartial third party to enhance and maintain healthy family relationships.

## Our Mission

ONST 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

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RELATIONSHIPS

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SOLUTIONS

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## Office Locations

Greensboro

Wilmington

Lexington

Greenville

Siler City



OLD NORTH STATE TRUST

*From Vision to Value*

SENIOR  
LIFE  
SERVICES

[www.oldnorthstatetrust.com](http://www.oldnorthstatetrust.com)  
336-646-ONST (6678)

*A family heritage of Trust*



## A History of Old North State Trust

Old North State Trust (ONST) is a North Carolina based independent, family owned financial services company.

As the needs of our founders became more complex, ONST evolved from a family office into a chartered trust company regulated by the state of North Carolina.

Today, ONST is a well-established trust company that offers families and individuals meaningful and personalized service.

Our firm was built on a foundation of trust and integrity- those principles govern all of our client relationships.

## Senior Life Services

At Old North State Trust , we realize that the intricacies of a family's financial needs can be overwhelming and complicated. Our professionals can help create a strategy and navigate you through your unique situations.

Today, seniors are living longer. Due to varying circumstances, families may not be aware of their loved one's needs or simply live too far away to help on a consistent basis. ONST can seamlessly provide oversight for you and engage other service providers to preserve the quality of life and care that is needed for your family member. Collaborating with ONST will relieve the burden from you and your loved ones and give you peace of mind.

Through Senior Life Services, we provide comprehensive services including but not limited to:

- Bill Paying Services- tracking and reporting
- Money Transfer via wire, ACH, check
- Financial cash flow analysis
- Portfolio Management
- Estate Planning
- Insurance review
- Tax Filing Coordination
- Document Management
- Scheduled reviews
- Coordination with other trusted advisors
- Budgeting/Household/Mail management
- Long Term Care (LTC)



## Our Approach

We take time to understand what is important to our clients. We collaborate with our clients' other professional advisors to collectively implement meaningful solutions. We are a fee only service provider.

Old North State Trust professionals are experts in the areas of-

- Trust Administration
- Asset Management
- Foundation and Endowment Services
- Estate Settlement

***“Our Passion for Service is Our Highest Mission”***