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.

"Committing to your Finacial Security"

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

336-646-ONST (6678)

www.oldnorthstatetrust.com

Corporate Office Address
1250 Revolution Mill Dr.
Suite 152
Greensboro, NC 27405

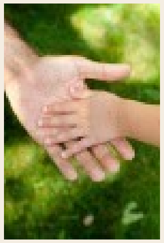
Special Needs Trust

A family ***heritage*** of Trust

Old North State Trust offers

Qualified Consultants
A trusted team
Support

OLD NORTH STATE TRUST



Friendly, Knowledgable Advisors

Dependable and Honest- Old North State Trust brings distinction in objectivity, expertise and flexibility to fee-based services with an intense focus on quality customer service.

Trustworthiness is the cornerstone around which we have built our company. This is the most defining characteristic of our business philosophy and has been emphasized since the inception of the company. Honesty, integrity, and fairness are what define our service and dedication in meeting the financial goals of our clients.

Finding an advisor that's right for you >>>

Old North State Trust is an independent firm providing a wide range of financial services to Individuals, Families, Businesses, and Foundations. ONST recognizes that strategic and thoughtful planning are critical for financial success. Our team of professionals are backed by over 250 years of experience in financial services, which provides our clients with comprehensive knowledge and expertise utilizing a holistic approach.

How We Can Help >>>

The administration of a special needs trust account can be very complex and time consuming. Initially, Old North State Trust works with attorneys to ensure the documentation and trust account provisions conform to meet legal requirements. Moving forward, our team provides the services necessary to maintain the trust account, meet governmental compliance for benefit programs, and manage the payment of expenses from the trust account.

PROTECT YOUR FUTURE

Many of us take for granted the ability to go through our day to day lives providing for ourselves. Even in perfect health, some of us struggle to handle personal financial matters successfully. Living with a disability can make that challenge even more complicated.

Parents and loved ones usually take on the care giving responsibilities for relatives with disabilities. Deciding who will take on that responsibility when they are no longer able can be particularly stressful. A trust account is an effective financial tool that answers some of these questions and alleviates the uncertainty that can arise from balancing financial decisions with compliance.

Trust accounts help beneficiaries protect their privacy, minimize the tax impact on an estate, and organize and implement the distribution of assets upon the account grantor's passing.

Corporate Trustee >>>

As the corporate Trustee of a trust account, ONST can handle financial matters, ranging from record keeping to bill payment to processing tax returns. We can also provide the expertise needed to invest and protect your assets, so that future living expenses are covered.

The compensation and damages received from a personal injury case can often be difficult to manage and in some cases may not be enough to provide for the long-term financial welfare of an individual. By partnering with our firm, you can feel secure that you will receive the individual service you deserve over the course of your lifetime.

Our Advisors can help delevop a strategy to meet your family's needs.

As Trustee, we will >>>

*Assist with estate planning and long-term care decision-making.

*Seek out resouces of funding for the trust account.

*Maintain conformity with the trust's provisions.

*Pay for supplementary expenses not covered by the SSI program.

*Perform record-keeping and assessment for tax purposes.

*Provide quarterly statements.

"Our Passion for Service is Our Highest Mission"