

## **National Advisors Announces Agreement with PDS Companies for Unique Asset Services**

Kansas City, MO (August 9, 2016) National Advisors (NA) announced that it has contracted with PDS Companies (PDS) to deliver specialty asset services to advisors for their high-net-worth clients. PDS is a leader in the specialty asset services field, specializing in unique and hard-to-value assets such as mineral, oil and gas, farm and ranch, real estate, and closely held businesses. PDS services will be marketed through NA's National Advisors Concierge Services (NACS) entity.

“Unique assets represent roughly half of the assets of high-net-worth investors,\* yet most advisors do not offer unique asset services,” said Jim Combs, CEO of National Advisors Holdings, Inc. and National Advisors Trust Company, FSB. “We chose to partner with PDS because of their expertise in managing the complexities of specialty assets. With PDS our advisors can add unique asset services to their offerings and create a differentiation for their firm in the marketplace, attract high-net-worth prospects, and expand assets under management with their wealthy clients.”

Trust accounts often hold unique and hard-to-value assets requiring specialized management and accounting. PDS addresses the complexity of specialty assets operations and management by providing reporting, accounting, outsourcing of operations management, and consulting services. PDS delivers an integrated package of experience, technology, and innovation in support of specialty assets held in trusts, estates, and other fiduciary relationships.

Kip West, Chief Operations Officer of PDS Companies, commented, “PDS has seen an increased number of clients and advisors presenting wealthy clients’ portfolios with a larger portion of those portfolios containing unique assets. Advisors that can provide services for all asset classes have a greater advantage in the marketplace. Having been in the business of managing unique assets for fiduciaries for over 30 years, PDS is uniquely qualified to provide the outsourced services that advisors require to take advantage of this opportunity to grow their business.”

\*Source: PDS Companies. Data drawn from Internal Revenue Service estate tax returns filed in 2014.

### **About PDS Companies**

PDS Companies is the only independent organization that is nationally recognized as an expert in all classes of unique and hard-to-value assets. PDS Companies is committed to providing excellent business services and solutions that safeguard the expectations of clients and their diverse range of fiduciary responsibilities in a fast paced, competitive market. PDS’ goal is to utilize the most advanced technology and efficient business practices to ensure the financial stability of our shared customers. PDS’ expert staff takes pride in the strong client relationships we have built together based on the quality of the products and service we provide. [www.pdscompanies.com](http://www.pdscompanies.com)

### **About National Advisors Concierge Services**

National Advisors Concierge Services (NACS), an entity of National Advisors’ family of companies, delivers third-party services to clients of National Advisors Trust Company, FSB and National Advisors Trust of South Dakota, Inc. NACS third-party services include: specialty asset services (unique and hard-to-value assets such as mineral/oil/gas, farm and ranch, closely held corporations, etc.), banking services including lending and retail banking and a client experience benchmarking syndicate (CX2020). [www.natrustco.com](http://www.natrustco.com)

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