Petersen Hastings Partners with National Advisors Trust Company to Expand Trust Services

New private-labeled trust services brand formed, Petersen Hastings Private Trust.

Kennewick, WA (January 25, 2016) – Petersen Hastings, the second largest independent wealth management firm in Eastern Washington, today announced that it has joined National Advisors Trust Company (NATC) as its newest client and become a shareholder in National Advisors Holdings, Inc. The partnership significantly expands Petersen Hastings' trust solutions as part of the company's holistic approach to providing world-class wealth management services to valued clients. With NATC's national charter, Petersen Hastings' clients have access to expert trust services in every state, allowing them a nationwide choice of the most tax favored trust situses to fit their needs.

Petersen Hastings Private Trust

Petersen Hastings is implementing NATC's exclusive Trust Representative Office (TRO) program. The TRO program allows Petersen Hastings to market a full range of branded trust and trustee services through its new private label, Petersen Hastings Private Trust, with administrative trust services provided by NATC.

"With history's largest generational wealth transfer underway, there is an increased need to provide our clients with expert trust solutions that fulfill their wishes, and define and protect their legacy today and for the future," stated Jeff Petersen, CEO of Petersen Hastings. "With our new private label, Petersen Hastings Private Trust, we are able to provide complete trust services to clients to facilitate their wealth transfer and estate planning objectives, in addition to our extensive wealth management solutions."

Jeff Petersen continued, "By marketing trust services under our own brand, Petersen Hastings is able to offer clients a seamless and embedded solution within our integrated scope of services. Our firm's goal is to establish lifelong relationships with clients, their families, and others who are important to them. As a best-in-class partner, NATC provides us with comprehensive trust solutions that expand our ability to deliver expert wealth management services to our growing number of clients over multiple generations."

The Partnership

NATC is dedicated exclusively to serving as an integrated complement to wealth management firms by providing trust services that help bring advisors closer to their clients with deepened relationships that lead to client retention through generations of wealth transfer.

According to Jim Combs, CEO of NATC, "It's a privilege to be working with a wealth management firm like Petersen Hastings that is devoted to serving clients. By always putting their clients' needs first, Petersen Hastings has built trusted and long-lasting relationships with loyal clients who choose their firm because of their absolute commitment to helping every client attain their personal goals. With the addition of NATC's trust solutions, and the launch of their new trust services brand, the firm has a strong differentiation that will enhance and solidify their reputation as world-class experts and a one stop resource for clients."

Advantages of NATC's Unbundled Trust Model

NATC partners with trusted advisors in a corporate directed trustee (CDT) model wherein the advisor owns the client relationship and all investment activities, and NATC delivers complete trust administrative services.

"NATC's CDT unbundled approach is a powerful trust model that gives clients the ability to maintain Petersen Hastings as their investment firm, while having the comfort and stability of NATC, a regulated financial institution, serve as administrative trustee," said Matthew Petersen, Wealth Advisor for Petersen Hastings. "Additional specialists can be involved if there is a need for a distribution advisor or trust protector in the management of the trust. NATC's unbundled approach allows a high level of flexibility and control, and has better checks and balances than other trust models."

Shareholder in NAH

Becoming a shareholder in NAH is further evidence of Petersen Hastings' commitment to trust services and to its partnership with NATC.

Scott Sarber, President of Petersen Hastings, explained, "We were enthusiastic about the opportunity to invest in NAH and establish an ownership position as part of our allegiance to the partnership. It underscores our intention to fully engage with NAH in a true partnership relationship. There's a great synergy between our companies' values and culture, our client-focused approaches and commitment to excellence."

About Petersen Hastings

Petersen Hastings is a Registered Investment Advisor located in Kennewick, WA. As a primary fiduciary, Petersen Hastings serves committed investors with complex financial needs. Our multigenerational team of experienced and credentialed professionals delivers innovative solutions through The Trusted Financial Path™ to enhance and preserve wealth. For more information on Petersen Hastings, visit www.petersenhastings.com.

National Advisors Holdings, Inc.

National Advisors Holdings, Inc. is the holding company for National Advisors Trust Company, FSB, and National Advisors Trust of South Dakota, Inc.

- **National Advisors Trust Company, FSB**
  National Advisors Trust Company, FSB (NATC) is a premier, independent national trust company providing expert trust services and solutions to trusted advisors and the families they serve. NATC is committed to enriching lifelong relationships. For more information on NATC visit www.natrustco.com.

- **National Advisors Trust of South Dakota, Inc.**
  National Advisors Trust of South Dakota, Inc. provides trusted advisors with progressive trust services for high net worth (HNW) and ultra high net worth (UHNW) clients who wish to take advantage of South Dakota's unique trust jurisdiction opportunities for protecting and passing on wealth. South Dakota is the nation's top situs for asset and creditor protection. For more information on NATSD visit www.natrustsd.com.

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