

**FOR IMMEDIATE RELEASE**

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## **NATIONAL ADVISORS TRUST CONTINUES TO EXPAND SHAREHOLDER BASE**

*Sage Rutty and Matrix Wealth Advisors are the most recent additions to the RIA owned trust company*

**OVERLAND PARK, KS.**, February 26, 2009, National Advisors Trust today announced that Sage Rutty, a Rochester, NY based RIA and Matrix Wealth Advisors, a Charlotte, NC based RIA, are the most recent additions to the shareholder base of the predominately RIA owned trust company. National Advisors Trust, a federally chartered trust company, able to operate in all fifty states, recently announced its plans to expand the shareholder base of over 125 RIA firms.

"Sage Rutty's relationship with National Advisors Trust gives our clients exclusive access to a complete solution for their financial advisory needs, today and in the future." said Wayne Holly, president of Sage Rutty & Company. "There are many specific reasons we chose to work with National Advisors Trust such as, responsiveness to needs, safety and security of clients' assets, offering both traditional and alternative investments, seamless access to trust services, cost issues and enhanced trading capability," continued Holly.

Giles Almond, president of Matrix Wealth Advisors stated, "We're very excited to be part of National Advisors Trust's expanded shareholder group. In addition to providing trust and custody services our clients need, the driving force behind our interest was the trust company's ability to provide the broadest range of investment alternatives." Almond went on to say, "Matrix uses pooled funds as a key element of our investment strategies. National Advisors Trust's services for pooled fund custody, accounting, and valuation will greatly enhance the breadth and quality of investments available to our clients."

"The addition of these two exceptional firms is a clear reflection of the direction of National Advisors Trust," stated Ron Ferguson chief executive officer. "They are both highly regarded firms in their respective markets and offering trust services is a key component of their overall value proposition to their clients."

National Advisors Trust formed in 2001 by over 82 independent financial advisors, has grown to over 125 financial advisors with assets of over \$3.8 billion. National Advisors is one of the largest independently trust companies in the nation, and is regulated by the Office of Thrift Supervision.

"Interest in using a nationally chartered trust company like National Advisors Trust is trending very high especially in this period of shifting with the large financial services companies." Ferguson pointed out, "The trust company's inherently transparent structure is a significant advantage to advisor firms as we don't sell any products, we don't make loans and we don't accept deposits, National Advisors Trust is just focused on providing great trust and custody services for our Advisor Firm's clients."

Giles Almond from Matrix added, "This is the solution clients have wanted. Few people want to force family members to deal with large, impersonal financial institutions. National Advisors Trust respects the relationship with our clients and allows Matrix to remain the financial advisor in a family relationship and service a trust locally while working with a national trust company. "

#### **About Matrix Wealth**

For 18 years, Charlotte based Matrix Wealth Advisors has been helping clients as a "personal CFO" to make informed decisions with regard to investment management, personal financial planning, risk management, estate planning, charitable gift planning, education planning, and tax planning. A full-service financial advisory firm with a staff of seven, Matrix Wealth Advisors manages \$140 million in assets for clients throughout the Southeast. For more information on Matrix Wealth Advisors please visit [www.matrixwealth.com](http://www.matrixwealth.com).

#### **About Sage Rutty**

For nearly 100 years, Sage Rutty has been helping clients make informed decisions with regard to investment implementation and management, business strategies, risk management, estate planning, charitable gift planning, education planning, and tax planning. A full-service financial firm with 24 financial advisors, 11 of whom are Certified Financial Planners®, Sage Rutty manages \$1.3 billion in client assets. For more information on Sage Rutty please visit [www.sagerutty.com](http://www.sagerutty.com) .

#### **About National Advisors Trust**

National Advisors Trust Company, FSB, is a federally-chartered trust company with assets of more than \$3.8 billion. It is the largest independent, RIA owned trust company in the nation. National Advisors Trust was formed in 2001 by 82 of the nation's top financial advisory firms to set a new standard of excellence in

trust and custodial services and to facilitate multi-generational client relationships through trust services. The trust company has grown to over 125 financial advisor shareholders and through the combined strength and size of these firms, National Advisors is able to provide a superior level of trust and custodial services along with advanced investment management systems and investment alternatives. National Advisors Trust is chartered in all 50 states, is regulated by the Office of Thrift Supervision (OTS) and is a FDIC member. National Advisors Trust Company, FSB, is a wholly owned subsidiary of National Advisors Holdings, Inc., a Delaware Corporation. For more information on National Advisors please visit [www.nationaladvisorstrust.com](http://www.nationaladvisorstrust.com).

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