Nicole Nally, CTFA, AIF®#

Louisville Metropolitan Area

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Summary

Argent Trust Company is Argent Financial Group's flagship subsidiary. For over 30 years, we have helped individuals, families, businesses, and institutions ensure their legacy and safeguard their wealth through trust administration and estate planning, investment management, and other fiduciary services.

Argent Trust operates under a Tennessee-domiciled trust charter so that our clients may benefit from Tennessee's very advantageous trust laws. Tennessee is a friendly state to trusts because of its favorable tax laws and other asset protection legislation available to anyone in the U.S. as long as a qualified trustee is a resident of Tennessee or part of a Tennessee-based trust institution, such as Argent. Argent Trust is Tennessee's largest state-chartered independent trust company.

Experience

Regional Manager and Chief Fiduciary Officer - East Region

Argent Financial Group, Inc.

Jul 2020 - Present (1 year +)

Market President & Sr. Trust Officer

Argent Financial Group, Inc.

Apr 2012 - Present (9 years 3 months +)

Senior Vice President & Personal Trust Manager

Regions Bank

Mar 2003 - Apr 2012 (9 years 2 months)

Established trust company satellite office for Morgan Keegan/Regions Bank in the Louisville, Southern Indiana markets. Responsible for new business development and adminstration, compliance and education of in-house branch colleagues.

Increase revenue for various lines of business throughout bank and financial advisor network through cross-selling efforts and strategic marketing plans that include financial and estate planning.

Vice President & Personal Trust Manager

Louisville Trust Company / The Sachs Company

Jan 2000 - Feb 2003 (3 years 2 months)

Handled all aspects of a start-up, independent, local trust company. Increased revenue with existing brokerage clients utilizing financial and estate planning techniques. Reduced operating costs through strategic partnerships with various outside financial institutions as well as streamlining costs and expenses and revenue structure. Annual reporting of trust assets to Kentucky Department of Financial Institutions (KDFI) and led audit process through various agencies including KDFI, NASD, SEC.

Developed trust company policies and procedures, contact management programs and website information.

Vice-President & Trust Officer
U.S. Bank
Jan 1998 - Jan 2000 (2 years 1 month)
Developed custodial marketing strategy for the Louisville area working with independent money managers as well as local trust companies. Structured fee schedules, trade order execution, "private labeling", policies and procedures as well as interface issues.

Probate/Estate Paralegal
L.Kent Robinson PSC
1997 - 1998 (2 years)
Probate administration, financial planning, estate planning document drafting and assistance with execution. State and Federal fiduciary tax return preparation and State inheritance tax return preparation.
Handled various client relation matters as well as accounts receivable/payable and billing.

Administrator / Office Manager
S.G. Donahue & Company, Inc.
1993 - 1997 (5 years)
Supervision of administrative staff as well as financial planners located in Louisville and Owensboro.
Responsibilities included administration of various retirement plans that included
401(k), 403(b), 457 and IRA accounts.
Coordinated plan document updates and reviews as needed.
Preparation and implementation of comprenhensive estate and financial plans that included life insurance, disability and extended care insurance needs assessments, retirement income projections and portfolio reviews.
Increased client base and revenue through on-site employee seminars and enrollment meetings.

Planning Technician
UPS
1992 - 1993 (2 years)
Aircraft Maintenance Planning Technician responsible for coordination of various routine maintenance checks for UPS aircraft. Handled FAA entry of aircraft logsheets as well as maintenance requests from pilots and various other crew members.
Also received specialized training on DC-8, 727 and 747 engines as well as flight simulations.

Estate/Life Underwriter
Prudential Financial
1987 - 1992 (6 years)
Debit insurance agency underwriter responsible for field underwriting of life, health and disability insurance. Death Claim processing, premium collection, loan and disbursement processing.
Participated in "Dialing for Dollars" marketing strategy increasing production for staff of agents comparing various property and casualty insurance products.

Fixed and Variable annuity enrollment for substantial religious organization member's retirement plan.

Education

University of Louisville

Accredited Investment Fiduciary - AIF®#
2016 - 2016

Cannon Trust School
CTFA, Certfied Trust and Financial Advisor
2004 - 2005

Bingham Fellows, 2011

Leadership Louisville Class of 2009

Licenses & Certifications

CTFA

AIF®# - Center for Fiduciary Management (CFFM, now part of Fi360)

Skills

Retirement Planning • Strategic Financial Planning • Retirement • Estate Planning • Financial Services • IRAs • Life Insurance • Portfolio Management • Wealth Management • Insurance