



Diversification: The Key to Weathering Financial Storms

Uncertain financial markets provide ample opportunities for plaintiff attorneys and their clients to take advantage of a range of income tax-free or income tax-deferred financial solutions. The most prudent approach is often a combination of financial vehicles, providing the attorney or claimant with a diverse portfolio that balances safety and growth potential.

INSURANCE-BASED OPTIONS

Structured Settlement Annuity: Flexible payment design, guaranteed¹ payments, no overhead or annual fees

Deferred Income Annuity (DIA): Payments starting after 12 months, guaranteed and lifetime payments, no underwriting

Fixed Indexed Annuity (FIA): Lump sums, lifetime or annuitization (period certain & life) with guarantee of principal and upside tied to an index (S&P 500 or similar)

Multi-Year Guaranteed Annuity (MYGA): Fixed rate and guaranteed payments for a specific term, guarantee of principal

MARKET-BASED OPTIONS

United Settlement Advantage®: For the plaintiff looking for tax-deferral and market-based returns, who does not need the settlement proceeds to be guaranteed payments

United Fee Advantage®: For any contingency fee attorney looking for tax-deferral, market-based returns, and the ability to use their own financial advisor

Investment Accounts: Low-cost platforms offering financial education and investment management services

With local offices across the country, our team offers award-winning comprehensive settlement planning services.

TRUST SOLUTIONS

Special Needs Trusts, Pooled Trusts, Minors' Trusts, Settlement Preservation Trusts and more: Depending on the claimant's age, needs, income, and level of disability, options are available to preserve settlement proceeds while providing income to meet life's necessities.

For more information regarding comprehensive settlement solutions, contact us today.

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¹ Guarantees are subject to the claims-paying abilities of the issuing insurance companies.

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