Settlement planning and specialized support

Wealth Management

Settlement planning and specialized support

When a client receives a legal settlement, especially after a personal injury, wrongful death or medical malpractice case, it often marks a turning point. But it also brings all kinds of uncertainties. We help clients and their attorneys turn this moment into a lasting foundation for financial confidence and well-being.

A comprehensive approach to long-term financial well-being

Our comprehensive approach begins with a deep understanding of each client's needs, now and in the future. We help customize structured settlement options, implement personalized money management strategies and establish appropriate trust vehicles. Just as important, we consider the ripple effects of the settlement across all areas of life.

This includes helping families preserve access to governmental benefits, evaluate home modification needs, plan for nursing or long-term care and protect vulnerable beneficiaries. We coordinate with attorneys, care managers and other professionals, to help make sure each detail aligns with the client's long-term goals.

Depending on the case, we may coordinate with attorneys, care managers and specialists to help clients:

- Preserve access to governmental benefits like Medicaid or Social Security
- Plan for long-term care, including nursing or in-home care
- Modify a home to improve accessibility and quality of life
- Protect minor beneficiaries or beneficiaries who are disabled
- Support budgeting and financial literacy for recipients and families

This high-touch support continues long after the initial settlement, helping clients adapt as needs evolve.

Trusts and legacies

Helping families build, preserve and protect their legacy

For many families, trust planning is a key part of broader wealth planning. Whether your goals include protecting a loved one, reducing taxes or planning for future generations, our team delivers personalized solutions rooted in your values.

We collaborate closely with clients and their attorneys to incorporate the right trust structures into a cohesive wealth strategy. From legacy planning to disability trusts and beyond, we help make sure your plan reflects the nuances of your life, not a one-size-fits-all template.

Commonly used trusts include:

- **Disability trusts** — For families supporting dependents with disabilities.
- **Settlement protection trusts** — To protect assets from a legal settlement.

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