

An Advisor to Guide Your Investment Decisions

You need help making the investment decisions that will position your settlement to last. But will the typical investment team understand your unique needs?

We get it. We understand the particular challenges of settlement recipients –real families who have to make enormous investment decisions, often for the first time in their lives.

We will help you make the choices that can provide security for the long term. We start by planning with you for your future. We have been serving injured clients, and their attorneys, since 2003.

Your needs. Our experts. Trusted advice.

Getting You On the Right Path

To make a settlement last, you have to invest it, and, where it makes sense, insure it. You must strike the right balance for your situation – investing or insuring some of your recovery to generate income, some for long-term growth and some to protect against downside.

We work with settlement recipients to determine the investment and insurance mix that suits their unique needs. We help them make a plan. Then we help them put that plan into action.

How We Work With Families and Individuals

Some families want ongoing advice. Some want a plan they can put into place and leave alone for years.

Bottom line: Everyone is different.

We adjust to your preferences, working together in the style that you prefer.

WE CAN ALSO HELP WITH: Guidance on budgeting & everyday financial decisions | Insurance & tax planning | Estate planning & trusts

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