

SETTLEMENT

ASSET MANAGEMENT TRUST



THE SAM-TRUST WITH ESI - ENHANCED STRUCTURED INCOME®

A Trust Containing High Yield Fixed Annuity Payment Rights with Guaranteed Returns from Highly Rated Life Insurers Exclusively for Injury Victims

WHO IS SYNERGY ASSET MANAGEMENT?

Synergy Asset Management was founded by a team of settlement planners on the premise of building a bright financial future for injury victims through the use of innovative financial planning products and services. The Settlement Asset Management Trust (SAM-Trust) is our exclusive creation that can provide income for health, welfare, maintenance and support through the use of traditional structured settlements and/or Enhanced Structured Income®. It also has the flexibility to address unpredictable needs and provides for the growth of assets not needed at the present time. The SAM-Trust is highly customizable and can be tailored to the unique financial requirements of someone who has suffered an injury.

WHAT IS THE SAM-TRUST AND HOW DOES IT WORK?

The SAM-Trust is an irrevocable spendthrift trust that will pay for all of the necessary life needs of an injury victim. While it can provide the necessary income for an injury victim through the use of Enhanced Structured Income® (described below) and/or a traditional structured settlement, it can also adapt to changing needs because of its inherent liquidity and flexibility. Income, growth and flexibility are accomplished through a variety of proprietary money management strategies designed specifically for your individual requirements.

Synergy Asset Management provides a combination of trustee services and asset management services so an injury victim and his or her family can easily manage their rapidly changing financial situation. At the same time, the injury victim's needs and wishes can be addressed so the focus is on recovery. A very high percentage of injury victims dissipate their entire recovery after there is a settlement or verdict, but with prudent planning and spending your financial future is secure.

WHAT IS ENHANCED STRUCTURED INCOME®?

Enhanced Structured Income® (sometimes referred to as ESI) is payment rights from fixed structured settlement annuities that have been sold at a significant discount to a third party purchaser. After the sale, the structured settlement annuity remains in force and the payments can be legally transferred to a new Buyer (SAM-Trust Trustee) through the purchase of ESI by the trustee. When ESI is purchased, the Buyer (SAM-Trust Trustee) is legally transferred the rights to future fixed structured settlement annuity payments in return for a one time lump sum investment.

CAN THE SAM-TRUST BE USED WITH BOTH A STRUCTURED SETTLEMENT AND ENHANCED STRUCTURED INCOME®?

Yes, the SAM-Trust can be used in conjunction with a traditional structured settlement, as well as with Enhanced Structured Income®. A structured settlement is an effective tool to provide guaranteed tax-free lifetime income for an injury victim. By pairing this product with the SAM-Trust, an injury victim can take advantage of the tax benefits of a traditional structured settlement while still enjoying the liquidity as well as flexibility offered by the SAM-Trust. The Enhanced Structured Income® component enhances the returns, providing the ultimate solution for injury victims.

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