

Allowing you

TO FOCUS ON WHAT YOU DO BEST



SYNERGY

SETTLEMENT SERVICES

ALLOWING TRIAL LAWYERS TO FOCUS ON
WHAT THEY DO BEST®



A Letter from the SYNERGY TEAM

Finalizing a settlement has become overly complex. We can help make it easier for you and your staff, allowing you to focus on what you do best – being a trial lawyer. We have a comprehensive suite of products, services and tools that make us an invaluable settlement partner.

Our company provides the following services (we can provide all or just one):

- **Asset Management Services** – Settlement trusts, trustee services and other settlement preservation strategies.
- **Attorney Fee Income Tax Deferral Strategies** – Attorney Fee Structures/Non-Qualified Assignments/Deferred Compensation Programs.
- **Lien Resolution** – Lien resolution services for Medicare, Medicaid, ERISA, military, private healthcare liens and any other healthcare subrogation issues.
- **MSA/Medicare Secondary Payer Compliance Services** – Medicare Set-Aside Allocation, funding and post settlement administration services.
- **Pooled Special Needs Trust Services** – Preserves Medicaid/SSI (needs based public benefits).
- **Settlement Planning Services/Structured Settlement Services** – Complex settlement planning and consulting.

Synergy will assist in facilitating the most positive outcome possible in each and every case. We look forward to the opportunity to be of service to your firm.

Sincerely,

Jason D. Lazarus, J.D., LL.M., MSCC, CSSC
Chief Executive Officer

Anthony F. Prieto, Jr. CFP®
President

B. Josh Pettingill, MBA, MS, MSCC
V.P. of Medicare Secondary Payer Compliance

Daniel J. Alvarez, J.D.
V.P. & General Counsel

We're Proud **SUPPORTERS** of





FOUNDATION

FOR THOSE WITH SPECIAL NEEDS

Giving back to the CIVIL JUSTICE SYSTEM

Founded in 2012, Synergy's Foundation For Those With Special Needs is a non-profit 501(c)(3) dedicated to helping those with special needs and supporting other charitable organizations that protect and promote the civil justice system. The Foundation was created as a way to give back to the civil justice system, support those that need its protections, and to serve as a trustee for the Settlement Solutions National Pooled Trust under 42 U.S.C. 1396p(d)(4)(C).

Since its inception, The Foundation For Those With Special Needs has generously donated over \$100,000 to worthy charities and causes, with a focus on charities championed by trial lawyer advocates.

The Foundation has supported numerous charities including:

- [The ALS Association, Florida Chapter](#)
- [AutoNation Cure Bowl](#)
- [Debra's Journey for Life Foundation](#)
- [Florida's Children First](#)
- [Lawyers to the Rescue](#)
- [Legal Aid Society of the Orange County Bar Association](#)
- [Maryland Association for Justice Foundation, Inc.](#)
- [Operation Smile](#)
- [Pound Civil Justice Institute](#)
- [Public Justice](#)
- [The Florida Justice Association Research and Education Foundation, Inc.](#)



SYNERGY

ASSET MANAGEMENT

Building FINANCIAL Futures for INJURY VICTIMS

Synergy Asset Management (SAM) offers unique financial solutions for injury victims, including settlement trusts and other proprietary personal injury recovery preservation strategies. The Settlement Asset Management Trust (SAM-T) is our exclusive creation. It is an irrevocable spendthrift trust that will pay for all of the necessary life needs of an injury victim with the flexibility to adapt to changing needs because of its inherent liquidity and flexibility. The trust has a portfolio of high-yield, fixed income investments (Enhanced Structured Income™) that provides a guaranteed stream of income, paired with a cash management account that provides for the growth of assets not needed at the present time. The SAM-T is highly customizable and can be tailored to the unique financial needs of someone that has suffered an injury. What sets it apart is that it provides critical spendthrift protection and can't be sold like a traditional stand-alone structured settlement on the secondary market.

Synergy Asset Management Provides:

- **Asset Management Services For Injury Victims**
- **Enhanced Structured Income (ESI)**
- **Settlement Asset Management Trusts**
- **Special Needs Trust Trustee Services**



SYNERGY

ASSET MANAGEMENT

ATTORNEY FEE INCOME TAX DEFERRAL STRATEGIES

Did you know that lawyers can defer taxes on their fees as well as the interest that it earns until the year in which a distribution is actually received? By deferring contingent legal fees, attorneys get to invest on a pre-tax basis, and by deferring payments over time less money is lost to taxes. Other benefits include custom cash flow management and the ability to tailor one's own income stream. Structured fees also have enhanced protection from creditors, judgments and divorce decrees.

Synergy offers two solutions for tax deferral of contingent attorney fees – an attorney fee structure and a deferred compensation program with Enhanced Structured Income® (ESI). An attorney fee structure is a pre-tax and tax-deferred annuity investment vehicle exclusively available for attorneys that earn contingent legal fees. Through Synergy's alternative deferred compensation program, attorneys can invest their legal fees on a pre-tax, tax-deferred basis into investments of their own choosing, including ESI.

Key reasons to structure fees:

- **It is a Pre-tax Investment in Guaranteed High Yielding Tax-Deferred Vehicles**
- **Deferring Compensation Over Time Results in Less Being Lost to Taxes**
- **Application of AMT Can Potentially Be Avoided**



SYNERGY

LIEN RESOLUTION SERVICES

Your COMPLETE SOLUTION *for* LIEN RESOLUTION

Synergy eliminates the frustration of lien resolution for trial lawyers by providing innovative lien negotiation and resolution services uniquely tailored to assist trial lawyers and their clients. We have the experience to help you navigate through the complex issues associated with lien resolution and are able to assist in protecting all parties' interests while aggressively negotiating resolution of health care liens in personal injury settlements.

Synergy Lien Resolution Services will negotiate and resolve the following types of liens on a percentage of savings basis:

- ERISA
- Private Insurance
- Medicare
- Hospital/Provider Liens
- Medicaid
- Military Plan

You can choose to outsource a single lien to us or allow us to handle all of your tough lien resolution issues. We can provide the right pricing plan for you and your client. Best of all, the cost can be passed along to the client in most states.



SYNERGY

MEDICARE SET ASIDE SERVICES

THE PLAINTIFFS SOURCE for MSP COMPLIANCE SOLUTIONS

Dealing with Medicare Secondary Payer Compliance issues can be complicated and can involve a host of difficult issues presenting professional negligence traps for all parties. Having an independent Certified Medicare Set-Aside Consultant involved in your case is critical. Synergy Medicare Set-Aside Services is an industry leading provider of Medicare Set-Aside Allocation (MSA) Services, professional administration services and future medical cost projections for workers compensation claims and personal injury cases. Most importantly, we are your source for ensuring compliance with the Medicare Secondary Payer Act (MSP).

Our MSP Compliance Group offers the following services:

- **Annuity Funding Options for Set Aside**
- **Medicare Set-Aside Self Administration Support**
- **Medicare Set Aside Trusts (professional administration)**
- **MSA Allocation Reports**
- **MSA Estimates**
- **Non-Medicare Allowable Calculation**



Skilled SETTLEMENT Planners

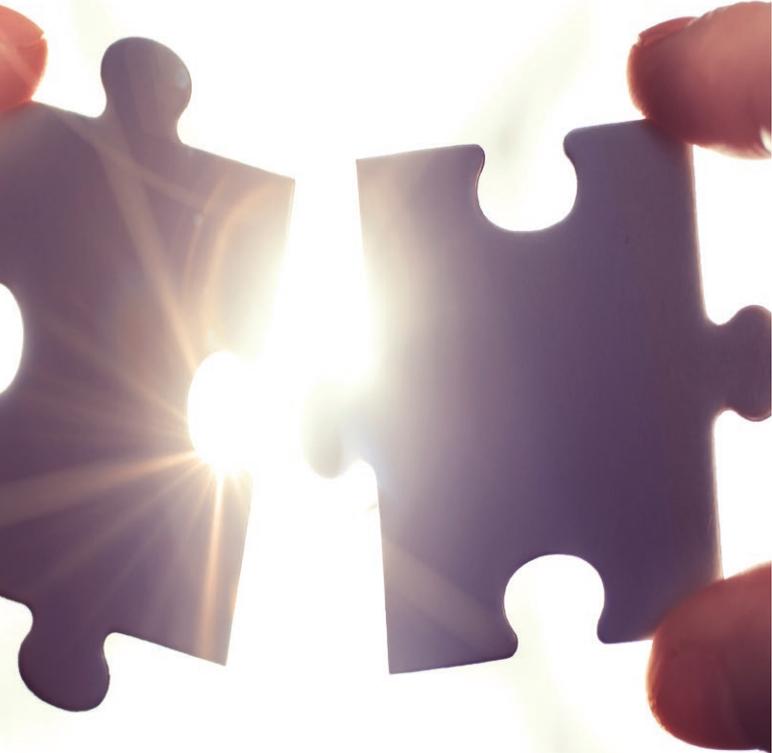
Synergy's settlement consulting group is one of the premier plaintiff focused settlement planning firms offering services nationwide. Synergy Settlement Consulting has been involved in the settlement of millions of dollars in injury settlements over the years. When it comes to settlement planning, depend on Synergy's experienced and trusted settlement advocates. Our seasoned planners are highly qualified in providing professional solutions for the most challenging cases.

We specialize in evaluating cases where clients are eligible for public benefits and advising regarding special needs trusts, settlement trusts, Medicare set-asides, and financial planning options for the personal injury settlement.

We can help injury clients plan for the uncertainties they face by maximizing the use of funds available to the client from both the settlement itself and available public benefits.

Synergy Settlement Consulting provides the following services free of charge:

- **Attorney Fee Structures**
- **Complex Settlement Planning & Consulting**
- **Qualified Settlement Fund Consulting**
- **Settlement Trust Consultation**
- **Structured Settlements Military Plan**





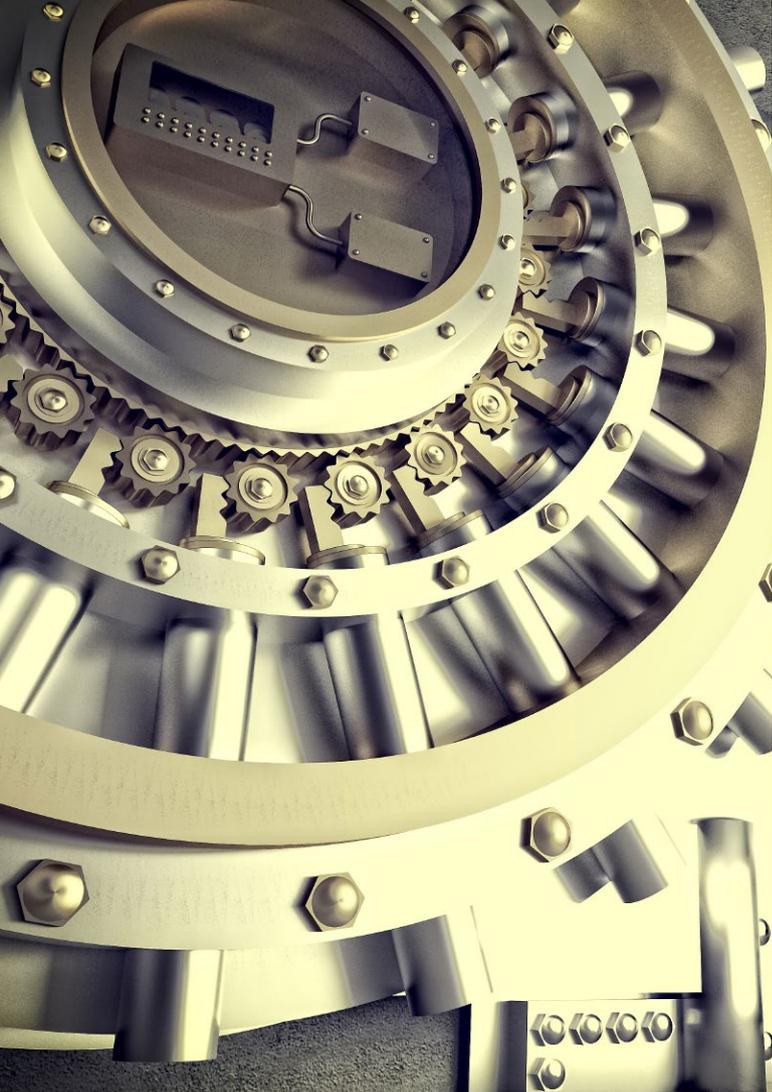
SETTLEMENT SOLUTIONS NATIONAL POOLED TRUST

SETTLEMENT SOLUTIONS NATIONAL POOLED TRUST *can Help*

The founders of the Settlement Solutions National Pooled Trust saw a need for a pooled trust that understood the special needs of injury victims and catered to those needs. SSNPT's mission is to treat every trust beneficiary with the dignity and respect they deserve.

When a person suffers an injury it can have devastating consequences on every aspect of her life. The ability to earn a living can be lost, medical bills can accumulate in the blink of an eye, and credit can be ruined in an instant. Frequently, this leads to the need to receive public benefits such as Medicaid and/or SSI. This is where the Settlement Solutions National Pooled Trust (SSNPT) can help. The SSNPT was created for the singular purpose of allowing injury victims to remain eligible for needs-based public assistance benefits.

By joining the SSNPT, an injury victim can continue to receive public benefits even after settling her case (regardless of the value of the case). Pursuant to federal law, an injury victim can have her settlement proceeds placed into a Pooled Special Needs Trust and continue to qualify for needs based public benefits. For those that are "dual eligible" (Medicaid/Medicare eligible), SSNPT offers a Pooled Trust Medicare Set Aside.



SETTLEMENT MANAGEMENT

NATIONAL POOLED TRUST

SETTLEMENT MANAGEMENT NATIONAL POOLED TRUST *to Protect the Recovery*

When a person suffers an injury it can have devastating consequences on every aspect of his life. The ability to earn a living can be lost. Sky-high medical bills can accumulate in the blink of an eye. Credit can be ruined in an instant. This frequently leads to the need to effectively manage the personal injury recovery at settlement. This is where the SMNPT can help. By joining the SMNPT, an injury victim can protect their settlement proceeds, have professional management of his monies with affordable trustee fees, and obtain needed health care coverage through the Affordable Care Act. SMNPT can provide taxable distributions to make sure the injury victim can get the maximum tax subsidies available.

The Settlement Management National Pooled Trust (SMNPT) was created as a cost effective way to manage the settlement proceeds for minors and incompetents. It is an alternative to establishing a guardianship and provides liquidity, as well as flexibility, for the injury victim. The trust is an irrevocable spendthrift that can be used for the health, welfare, maintenance, and support of the trust beneficiary. For minors, it can be set up with future lump sum distributions. A court order must authorize the future distributions if the settlement involves a minor. The trust contains provisions allowing the trustee to transfer the trust assets into a pooled, special needs trust in the event that the trust beneficiary needs to qualify in the future for needs-based benefits, such as Medicaid or SSI.

GET BACK TO DOING

what you do best – BEING A TRIAL LAWYER.

CONTACT SYNERGY SETTLEMENT SERVICES TODAY

to see how we can help with the most complex issues at settlement

877.242.0022

www.synergysettlements.com

SYNERGY

SETTLEMENT SERVICES

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