

| Settlement Trust Group

The Settlement Trust Group Advantage

When it comes to choosing a trustee to administer your client's Special Needs or other Settlement Trust, there are many factors to consider beyond location. Does the trustee have expertise in administering settlement trusts? Are the fees competitive? Can they accommodate smaller trusts? Will they be reachable and responsive when circumstances change or unforeseen events occur?

With the Settlement Trust Group you can be confident in answering "yes" to all these questions and more. Choose our services to gain the following advantages:

Expertise & Dedication

Our sole focus is serving the needs of personal injury victims and their families. Concentrating on one area allows us to be nimble, responsive and focused on providing best-in-class service to our clients.

Compassion & Understanding

We recognize personal injury victims' expectations differ from those of wealth management clients, and our administrators have in-depth experience handling their unique needs and circumstances.

Personalized Service

Each trust is assigned a dedicated administrator so the beneficiary speaks with a person they know, not a random call center representative.

Peace of Mind

Knowing your clients are in capable hands means not having to worry about receiving calls from unhappy clients.

Spanish Speaking Administrators

We have administrators fluent in both verbal and written Spanish.

Investment Options

We take a disciplined, client centered approach to investment selection, designing portfolios to meet specific client needs. Our investment professionals have more than \$1 billion of assets under management.

Government Benefits Expertise

We understand government benefit programs such as SSI, Medicaid and Medicare and can help your clients derive the most value from these programs.

Cost Savings

We negotiate with outside vendors to reduce the cost of items such as medical supplies, pharmaceuticals and handicapped-accessible vehicles.

The Settlement Trust Group delivers value and service through experience, objectivity and compassion. Call today and learn how we advocate for your success.

Settlement Trust Group
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