WANT A FINANCIALLY SOUND SETTLEMENT? GET THIS EXPERT.

When making important financial decisions, such as those arising from a successful lawsuit resolution, it's often assumed that a financial advisor will provide the best guidance. While that may be true in some circumstances, achieving financial security from the proceeds of a settlement requires specialized expertise.

Here are the top 3 reasons why your client NEEDS a settlement consultant.

Reason #1: Specialized Knowledge

A settlement consultant's training goes beyond traditional wealth management strategies. It also encompasses options specific to the financial inquiries of injured claimants and plaintiff attorneys, such as information about structured settlement and attorney fee deferral products.

In particular, settlement consultants are familiar with the many roadblocks that may prevent a smooth settlement resolution. From helping prevent the loss of government benefits to knowing whom to consult when a lien report is inaccurate, a settlement consultant has the unique background needed to provide the most comprehensive level of service possible.

Reason #2: Holistic Approach

Not only are an injured claimant's financial needs different than those of the typical financial advisor's client, but there is also an emotional aspect to settlement planning that a settlement consultant is better equipped to navigate. When someone has experienced a traumatic injury or the death of a loved one, there is an entirely different framework for creating a sense of long-term financial stability.

Whereas the typical financial client may be interested in investments and retirement savings, injured claimants must deal with future medical and economic complications that arise as a result of an accident, making the prospect of moving forward financially a daunting one. The cost of prescription drugs, home modifications, and prosthetics; eligibility for needs-based government benefits; replacing lost income; and trying to adjust to a new reality are all elements to consider.

Settlement consultants work daily with injured claimants and their family members, and they understand how to provide detailed, expert guidance while offering empathy and emotional support.

Reason #3: Team-Based Mentality

Instead of the solo approach often associated with financial advice, the best settlement consultants recognize the strengths that other experts bring to the table and will quarterback the settlement process for the claimant. Reputable settlement consulting firms have access to a broad range of tax, government benefit, lien resolution, estate planning, trust services, and wealth management experts that can help the claimant create a seamless plan for the future. Moreover, settlement consultants are not captive agents, guaranteeing that they will only consider the best interests of the claimant when recommending products and services.

Contact our settlement consultants today

Sage is proud to be the largest plaintiff-oriented settlement planning firm in the nation. With offices from coast to coast and a national network of experts, we have the resources you need to ensure that your clients are receiving the best advice. Contact us today to learn more.

With local offices across the country, our team offers award-winning comprehensive settlement planning services.

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