

Enhanced Attorney Fee Structure – EAFS

A Deferred Income Trust Product that Utilizes Selected Mutual Funds

Attorneys may now have their contingent fee income structured with a product that utilizes selected mutual funds for deferred fee payments.

We offer the Enhanced Attorney Fee Structure (EAFS) product in which the contingent fee income is structured to deliver future periodic payments to the attorney. These funds are placed in a select number of funds that provide potential appreciation for the attorney. In addition, EAFS offers the potential for deferral of both Federal and State Income taxes until the periodic payments are received by the attorney in the future. With this unique product the attorney may supplement previous annuity funded fee structure products with the market related performance offered by EAFS.

TRACK ONE (EAFS-V) – This track features selected Vanguard funds. These funds are utilized to provide mutual fund solutions that are in overall harmony with the objectives and duration of the attorney’s deferred fee payment obligations by the assignment company.

TRACK TWO (EAFS- Beta Plus) – We are proud to introduce the Beta Plus track that features multiple researched funds in families such as Dimensional, Vanguard, and Eaton-Vance, among others. Beta Plus is an actively managed strategy that will vary in allocation within the overall investment objectives. This active allocation capability combined with the re-balancing of the stated allocations may be desirable for many EAFS clients.

The EAFS program can be utilized on a stand-alone basis or in conjunction with the plaintiff’s structured settlement.

We bring unique opportunities for deferred fee structures, including:

- Returns associated with individually selected funds
- Affords possible hedge for inflation
- Utilize pre-tax dollars for your attorney fee structure
- Offered by proven financial services industry leaders



Please contact Henry Barkhausen at Settlement Advisors for additional information about EAFS with the Vanguard and Beta Plus tracks.

*Childs v. Commissioner, 103 T.C. 634 (1994), aff’d without opinion, 89 F.3d 856 (11th Cir. 1996).

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