

The background of the slide is a light blue, textured image showing a person lifting a child into the air. The scene is captured in a soft, painterly style with a hazy, dreamlike atmosphere. The person's arms are raised, and the child is suspended in the air with arms outstretched. The overall color palette is light and airy, with soft blues and greens.

Special Needs Trust Solutions

Special Needs Trusts
Pooled Special Needs Trusts
Settlement Preservation

TRUST & ASSET PLANNING, SIMPLIFIED

A personal injury or wrongful death case can have profound, life-altering implications. With financial security and physical well-being on the line, you may need assistance in determining the best strategy for the settlement funds.

If you are the parent or guardian of a minor child, then your first inclination is likely to establish a sense of security. If your settlement or your child's settlement is due to an injury, then there may be extensive physical limitations that require extensive medical care, as well as housing and auto accommodations.



Legacy Enhancement Trust offers a proactive, comprehensive trust planning and asset management approach that simplifies even the most complicated set of circumstances.

Our team has successfully assisted thousands of injured individuals across the country with developing trust and asset plans to last for years to come.

A CENTRALIZED APPROACH

Should I establish a trust?

How much liquidity do I need?

Is a structured settlement right for me?

How does a structured settlement work with a special needs trust?

How do I know what income I'll need in the future?

Should I invest my money? If so, how and when should I invest it?



At this point, you have likely considered some of these questions and many more. Most people do not have the specialized knowledge needed to navigate trusts and asset management, so if you find yourself with more questions than answers, you're not alone. When combined with the emotional aspect of a wrongful death or personal injury case, it can feel impossible to make the right choice.

That's why we're here.

Legacy Enhancement Trust brings together industry-leading experts in trust administration and asset management, all under one roof. Our ultimate goal is to help you, the beneficiary, move forward with a plan that best meets your needs and objectives. We work diligently to treat each beneficiary as an individual, developing a sense of trust and providing long-term support to our clients.

WHY SHOULD YOU CHOOSE LEGACY ENHANCEMENT?

The Mission

We are a nonprofit organization dedicated to providing minors and individuals with disabilities with an affordable, reliable trust solution.

The People

When you choose Legacy Enhancement Trust, you can expect warm, friendly service. We return calls and process distribution requests quickly and can accommodate any language through a translation service.

The Service

In addition to having online access to your trust account, we offer a prepaid debit card that gives you instant access to your trust funds.

Toll-Free: (866)587-8306
www.legacyenhancement.org

OUR PROCESS

Our four-step process is designed to streamline the many variables involved in creating your trust and asset management plan.

— 01 ANALYZE

Every trust beneficiary has different objectives, financial and medical needs, liquidity requirements, time horizons, and risk tolerance. We work closely with you, your family members and caregivers, your attorney, and your settlement consultant to ensure all stakeholders are on the same page.

— 02 RECOMMEND

After careful analysis, we will establish our recommendations that best meet your requirements. Legacy Enhancement Trust offers a variety of trust and asset management solutions, allowing us to fully customize options to meet your needs.

— 03 IMPLEMENT

Once you choose an option, we will provide you and your family with an implementation schedule explaining what needs to be done, when it needs to be done, and who needs to do it. With Legacy leading the implementation process, all pieces will be coordinated properly and efficiently.

— 04 MONITOR

Legacy's investment management team will monitor and track your progress. From trust disbursements to asset allocation and risk management, we monitor consistently and coordinate with attorneys, insurance companies, and trustees to generate long-term success.

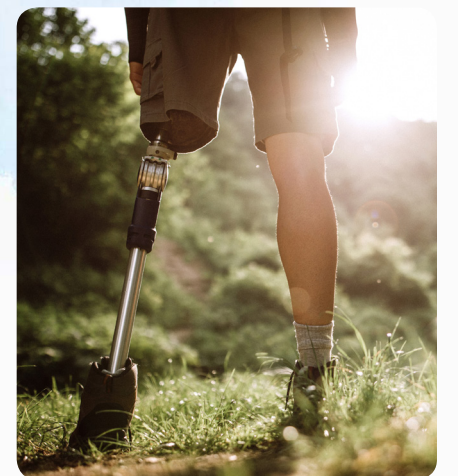
TRUSTS & ASSET MANAGEMENT

How do our trust services and asset management teams work together? Simply put, one side handles the trust administration and legal requirements, while the other side focuses on investment management.

With so many moving pieces, having teams that work in tandem helps create the best possible outcome for you, the trust beneficiary.

Trust Services	Asset Management Services
Plan design	Fiduciary approach
Drafting of trust documents	Third-party expertise
Coordination of needs & flexibility	Cash management
Distribution management	Model design

From immediate financial needs and trust design to future income requirements and expert investment management, Legacy Enhancement Trust is here to help. For more information, contact us toll-free at (866)587-8306.





Protecting your assets

**PRESERVING
YOUR
LEGACY**

START PLANNING FOR YOUR FUTURE TODAY.

To learn more, call us toll-free or visit our website.

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