



# 1792 CAPITAL

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WEALTH MANAGEMENT SERVICES  
FOR PLAINTIFF ATTORNEYS

[1792CAP.COM](http://1792CAP.COM)

# Who is 1792 Capital?

**WE ARE A TEAM OF EXPERIENCED WEALTH MANAGEMENT PROFESSIONALS** that work with individuals, families, and attorneys to build on their successes and progress toward their financial goals. Our team members help create comprehensive planning strategies to help our clients live the life they choose and pursue their most important goals. Investments, asset protection, liability management, and estate planning are tools for achieving those goals.

Our work is based on building relationships. Clients who work with us know that we care about their families and the real “why” behind their money. The stronger the connection we have with you, the more we can work toward adding value.

## WHAT WE DO

We serve clients with a variety of needs, so you will find our team members working with professionals who are ready to retire, philanthropists developing giving strategies, and families who are in the building stages of their wealth. Our services include:

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Financial Organization

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Cash & Credit Management

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Tax Strategies

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Estate Planning Strategies & Implementation

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Family Legacy & Governance

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Risk Management

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Investment Strategy & Implementation

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Attorney Fee Deferral



## WORKING WITH ATTORNEYS

We have a unique focus in our practice on serving attorneys by helping them build and protect their wealth with strategic, long-term solutions that can enhance their lives outside of their law practice.

## WHAT'S BEHIND OUR NAME?

The Buttonwood Agreement is the founding document of what is now the New York Stock Exchange and is one of the most important financial documents in U.S. history. The Agreement organized securities trading in New York City and was signed on May 17, 1792 between 24 stockbrokers outside 68 Wall Street. According to the legend, the signing took place under a buttonwood tree where their earliest transactions had occurred. The New York Stock Exchange celebrates the signing of this agreement on May 17, 1792 as its founding.

The values behind the Buttonwood Agreement – confidence and trust – are the cornerstones of 1792 Capital. Our team works every day to fulfill the trust our clients place in us. The year the Buttonwood Agreement was signed signifies why we do this work and the relationships we've cultivated with our clients.

Confidence

Trust

## OUR MISSION IS OUR FOUNDATION

Our mission is to courageously bring visions into being and build meaningful relationships in service to others.

Our work is driven by our desire to see our clients flourish – that their money is a means for transforming their lives for the better.

# Serving Attorneys

## WHAT WE DO FOR ATTORNEYS

Your law firm and partners have complex wealth management and investment needs that extend beyond the typical financial advisory relationship. We have decades of experience providing advice, guidance, and investment strategies to attorneys throughout the nation.

## IMPORTANCE OF SERVING ATTORNEYS

Our team has identified a distinct need in the marketplace to work with attorneys through their unique wealth management planning needs. The nature of your work and how you get paid influences how you might consider investing and planning for your wealth.

For example...

You might have to consider your investment options for lump sum case settlements.

You might consider insurance coverage – for your business or for personal needs.

How you structure your contingency fees can have an impact on how you plan for the future.

These are all things we can solve together so that you don't have to spend additional time researching, worrying, or planning on your own. We'll work with you through your unique situation.

## FOCUSED SERVICES

As always, we carefully assess your wealth management needs and develop a comprehensive plan with special attention to your work and payment structure. The services we most often provide for our attorney clients include:



LIABILITY  
MANAGEMENT



ATTORNEY  
FEE DEFERRAL  
STRATEGIES



TRUST  
SERVICES



# Attorney Fee Deferral Program

How you structure your contingency fees now can have a big impact on your planning for the future. Our team provides plaintiff attorneys with tax-deferred investment strategies that align with your cash flow needs, risk tolerance, and time horizon.

## HOW IT WORKS & BENEFITS

You may choose to place the full amount of contingency fees in the program, pre-tax.

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Benefit:

This allows for more growth vs. if the fee were taken as a lump sum and invested post-tax.

You may allocate funds to market-related investment portfolios.

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Benefit:

Your investments follow the flow of the markets.

You can create more asset-class diversification.

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Benefit:

More diversification in your portfolio addresses your needs based on income, retirement planning, operation expenses, and more.

We establish periodic payment plans.

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Benefit:

You can customize payment dates for more flexibility.

We establish an active or passive investment management approach, based on your needs.

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Benefit:

We'll establish which approach best fits your needs based on your time horizon and payment schedule.

# Investment Comparison:

## WITH AND WITHOUT THE ATTORNEY FEE DEFERRAL PROGRAM

Take a look at this sample portfolio to see the difference between an immediate cash payment vs. following our fee deferral program. Deferring contingency fees over time can make a meaningful difference and could potentially increase your practice's overall revenue.

IMMEDIATE CASH PAYMENT	INVESTMENT PLANNING STRATEGY
Pay taxes now (40% rate <sup>1</sup> )	Defer income and taxes
\$600,000 left over to invest	\$1,000,000 invested <sup>2</sup>
Invest in market/fixed growth <sup>2</sup>	Funds invested in customized portfolio
Taxed as it grows	Taxed when paid out

<sup>1</sup> Hypothetical tax rate for illustrative purposes only. Consult your own tax and accounting advisors for specific recommendations or comments regarding tax rates that apply to your situation, as individual circumstances may vary.

<sup>2</sup> Fees apply.

Wells Fargo Advisors Financial Network is not a legal or tax advisor.

# Attorney Fee Deferral Program Process

Our process for this program follows a specialized workflow that accounts for agreements, payment schedules, and fund management that follow your specifications. We create a transparent environment through every stage, and we make sure all parties are aligned to the agreed-upon plan.

1

## ESTABLISH DEFERRAL

- We begin our relationship together.
- You work with our team and your attorney to develop your Investment Strategy Statement (ISS) and asset allocation.
- We incorporate a payment schedule into our agreement.

2

## ESTABLISH INVESTMENT ADVISORY ACCOUNT

- Our team manages funds based on our agreed-upon ISS and asset allocation.
- You receive quarterly statements.

3

## DISTRIBUTIONS

- You receive payments on predetermined dates, as established in our agreement.
- You receive a 1099-MISC for any years you receive payments from this program.



## WE'RE READY TO SERVE

We proudly take a team approach to working with our attorney clients. George Christman is our team's primary resource for attorney initiatives, but our entire team works to deliver the highest-quality service that matches the hard work you do in law.

# Get in Touch

Attorneys who are interested in working with our team can reach out directly to George Christman to learn more about our offering or schedule a consultation.

1792CAP.COM



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