Plan. Invest. Defer.

Fee deferral allows an attorney to defer all or part of a contingency fee and invest it.

Get more from your fees

- Delay constructive receipt
- Place funds into an investment account pre-tax
- Work with your trusted financial advisor
- Add future fees

Why attorneys defer contingency fees:

- Smoother flow of income
- Uncapped retirement planning
- Preset plan for when and how much they'll be paid
- Useful in managing law firm cash flow

milestone®

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As a trial lawyer, you can strategically plan for your contingency fees around taxes, life's milestones, and retirement goals.

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When you defer your contingency fee:

You'll only pay taxes on the payments you receive within the year. Meanwhile, the rest of your fee will grow, tax-deferred, in an investment portfolio.

Your investment-backed periodic payment schedule will address both your short- and long-term financial goals.

Your deferral plan will work in lockstep with your financial advisor.

There are no limits to how much or how little you can defer.