



# What's your plan?

The Alcaine Group has nearly 26 years of combined experience in comprehensive settlement planning, including the use of Structured Settlements and traditional investments. We can also provide guidance on Medicare Set-Asides and the creation of irrevocable and Special Needs Trusts.

As fully licensed Financial Advisors, our strategies and services focus on the long-term needs of plaintiffs. You can trust that we are a partner with a stake in your clients' best interests.

## The Alcaine Group

**Carlos Alcaine**, Senior Vice President

**Stephen Halterbeck**, Registered Settlement Planner, Financial Advisor

**Cheryl Moore**, Registered Client Relationship Associate

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Roseville, CA 95661  
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Members of the Alcaine Group speak Spanish  
and can work directly with your clients.

*Carlos Alcaine – California Insurance License 0A81941*

*Stephen Halterbeck – California Insurance License 0F23825*



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**Great outcomes.  
Done well.**

## The Alcaine Group Distinction

### Plaintiff-only

Once a case settles, we align our efforts and recommendations to those that we believe will ultimately benefit the plaintiff. We believe this philosophy helps us focus on the needs of the clients, the injured party.

### Full-service financial advisors

As a boutique practice within Baird, we offer access to vast resources available through a world-class firm. For example, legal professionals can leverage Baird's tax planning, estate planning and investment expertise.

### Needs-based investment objectivity

Though we offer a broad array of financial products and services, we are not obligated to recommend one over another. Our only obligation is to provide the knowledge and long-range perspective needed by clients and attorneys during the settlement process.

### Mediation liaison services

As part of our needs-based approach, we think our presence eases anxious moments during mediation and helps ensure that the client's interests are protected from a financial perspective.

### Spanish-speaking capabilities

Though all of our business is transacted in English, we can help effectively communicate with clients who prefer to speak in Spanish.

### Experience

Our Financial Advisors have nearly 26 years of combined experience in the financial services industry.

*"This isn't something new for my financial practice; in fact, I've been helping plaintiffs and their attorneys make informed decisions about managing structured settlements for more than 20 years. Because our group works only with plaintiffs and their legal teams, we maintain our focus on acting in the clients' best interests.*

*We provide customized investment planning, mediation liaison services and access to the depth of resources available through a strong, global financial services firm. I think our experience helps relieve anxiety in stressful situations so we can all work together on what matters most."*

*– Carlos Alcaine, Senior Vice President*

The logo for Baird, featuring the word "BAIRD" in white, uppercase, sans-serif font, set against a blue parallelogram background.

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Done well.**