Professional Administration Process for Medicare Set-Aside & Medical Custodial Accounts

MEDIVEST

1 **Choosing professional administration to manage future medical needs? Provide required items to draft professional administration agreement**

Required items: Completed referral form (https://medivest.com/refer-a-case or call 877-725-2467); Annuity Illustration (if structured); MSA Allocation Report* or Life Care Plan
*include CMS Approval Letter if available

2 **Professional Administration agreement will be provided for review along with a checklist of items needed to activate the account**

3 **Checklist items and payments received**

Seed payment and administration fees should be made payable to:
Medivest Benefit Advisors, Inc. FBO (Claimant/Applicant's Name)

- Regular Mail: PO Box 23910, Santa Barbara, CA 93121
- Overnight Mail: 8 East Arrellaga St., Santa Barbara, CA 93101

4 **Account subjected to 50-point quality control review and then account is activated**

5 **Member Services sends the member their "Welcome Kit" and follows up with an introductory call**

The Welcome Kit contains everything the member needs to know about how their account will be administered and includes their ID card

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