



Wahlstrom & Associates
Professional Administration New Case Resource Guide

Items that Medivest will need in order to prepare the Enrollment Package:

- ☐ MSA allocation report
- ☐ CMS approval letter (if applicable)
- ☐ SS#, phone number, and email (if available) of claimant/applicant

Or

Use the Wahlstrom & Associates online referral portal:

<https://www.medivest.com/wahlstrom/>

Your primary points of contact for on-boarding support:

Joe Anderson, Vice President of Business Development

Phone: 415-606-1332

Email: janderson@medivest.com

Matt Cirincione, Sales Support Specialist

Phone: 877.725.2467 x7012

Email: mcirincione@medivest.com

Medivest's Tax ID number: 77-0445397

Instructions for mailing MSA initial seed and annuity payment checks:

Make checks payable to Medivest Benefit Advisors, Inc. FBO (applicant name).

Send regular mail to:

P.O. Box 23910

Santa Barbara, CA 93121

Overnight shipping address:

8 East Arrellaga Street

Santa Barbara, CA 93101