



**Chubb**  
**Professional Administration New Case Resource Guide**

**Items needed to begin MSA analysis:**

- ☐ Completed in-take form
- ☐ Most recent two years of medical records
- ☐ Most recent two years of rx records if available

**Or**

Use the Chubb online referral portal:

<https://medivest.com/chubb-referral-portal>

**Your primary points of contact for on-boarding support:**

**Julia Goodman**, Director of Sales- Midwest

Phone: 312-342-3645

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**Matt Cirincione**, Sales Support Specialist

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Email: [mcirincione@medivest.com](mailto: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

**Fees: One-time flat fee of \$950 for all MSAs**