



Lumen
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 Lumen online referral portal:

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

Your primary points of contact for on-boarding support:

Julia Goodman, Director of Sales- Midwest

Phone: 312-342-3645

Email: jgoodmann@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

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