



New Case Resource Guide

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

- ☐ MSA allocation report
- ☐ CMS approval letter (if applicable)

Or

Use the online referral portal: <https://medivest.com/pro-admin-referrals/>

Your primary points of contact for on-boarding support:

Craig Pawley, Vice President of Sales Phone:

949.632.0029

Email: cpawley@medivest.com

Cortney Perez, Sales Support Specialist

Phone: 877.725.2467 x7014

Email: cperez@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