James E Logan & Associates
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 Logan online referral portal:
https://medivest.com/logan-associates-referral-portal

Your primary points of contact for on-boarding support:

Scott Mattingly, Director of Sales
Phone: 704-402-7227
Email: smattingly@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

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