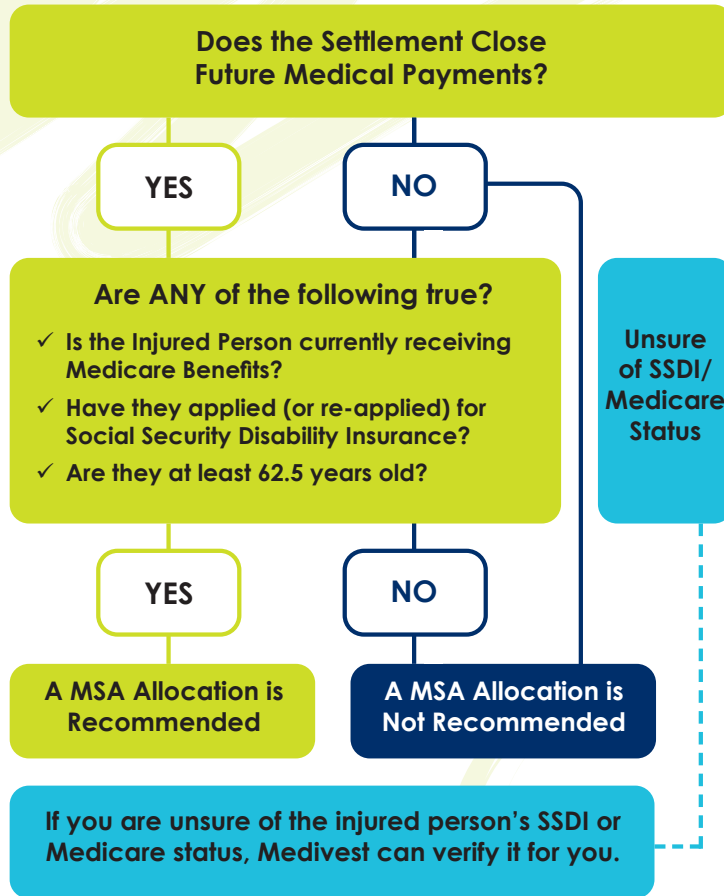


## Is a MSA Allocation Recommended?



## MEDIVEST OFFERS THE FOLLOWING SERVICES:

- Professional Administration Services
- Medicare Set-Aside (WCMSA or LMSA) Reports
- Medical Cost Projection (MCP) Reports
- Lien Resolution Services
- Trust Advisor Services
- MSA Self-Administration Kits
- Social Security/Medicare Verifications
- Medicare Conditional Payment Investigations

If you have any questions about whether or not your case meets the MSA review criteria, please contact Medivest.

## THINGS TO CONSIDER

- At age 65, a person may be eligible for Medicare benefits
- At age 62.5, a person is within 30 months of being eligible for Medicare benefits
- A SSDI applicant is potentially within 30 months of Medicare eligibility

## WHAT IS NEEDED TO COMPLETE AN MSA ALLOCATION: LMSA

- ✓ Completed Referral Form
- ✓ Most recent two years of:
  - Medical Records
  - Prescription Drug Invoices, if available

## WHAT IS NEEDED FOR SOCIAL SECURITY VERIFICATION?

- Completed referral form
- Signed Social Security release form





- Started in 1996. First company to ever administer a MSA arrangement
- Privately held by same partners since inception. Zero venture capital
- Average employee tenure is 8 years
- Offering Professional Administration, MSA Allocations, Trust Advisor Services, Medical Cost Projections and Lien Resolution



**Joe Anderson**

VP of Business Development

415.606.1332

janderson@medivest.com

*Celebrating*  
**25** YEARS