

Personal Injury Settlement Consulting

Is a Medicare Set-Aside Arrangement (MSA) Required?

1. Is it anticipated that there will be future medical expense relating to my client's injury? Yes No
2. Is my client a Medicare beneficiary? Yes No
3. Is my client receiving SSDI or RRD? Yes No
4. Has my client applied for SSDI or RRD or had my client applied and been denied but anticipates appealing the decision? Yes No
5. Is my client in the process of appealing and/or refiling for SSDI or RRD benefits? Yes No
6. Is my client age 62.5 years or older? Yes No
7. Does my client have End State Renal Disease (ESRD) but does not yet qualify for Medicare based on ESRD? Yes No
8. Does my client have Amyotrophic Lateral Sclerosis (ALS)? Yes No

If the answer to question 1 is YES and then the answer to any question between 2 and 8 is YES, then an MSA is required.