

## 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 refileing 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.