

## Personal Injury Settlement Consulting

### In settling the case, have I taken all of the necessary steps to protect my client and my practice?

1. Does my client have adequate medical insurance; i.e., if my client has Medicare, does he have a Medicare supplement?  Yes  No
2. Is my client entitled to any public benefits he is not currently receiving such as SSI, Medicaid, Medicaid Waiver Program, New Jersey Family Care, Section 8 Housing, Group Home, Food Stamps, or Psychiatric Institutionalization?  Yes  No
3. Has my client obtained advice concerning Federal and State estate taxes and income taxes?  Yes  No
4. Does my client have a Will, Living Trust, Living Will, and Power of Attorney? If my client is a minor or incapacitated person, do my client's parents have a Third Party Special Needs Trust?  Yes  No
5. Have I obtained a competent investment advisor or professional trustee for my client?  Yes  No
6. Does my client need a Special Needs trust?  Yes  No  
Note: See separate questionnaire, does my client need a special needs trust?
7. Would my client benefit from a Settlement Preservation Trust?  Yes  No  
Note: These trusts are particularly useful if the client is a minor or incapacitated person who is not receiving or likely to receive means-tested public benefits such as SSI and Medicaid or if my client needs assistance with money management)
8. Is a Medicare Set-Aside Arrangement required?  Yes  No  
Note: See separate questionnaire, is a Medicare Set-Aside Arrangement (MSA) required?
9. Would my client benefit from a structured settlement?  Yes  No
10. Have all liens been satisfied or reduced; including:
  - Medicaid  Yes  No
  - Medicare Advantage Plan  Yes  No
  - Medicare Part D  Yes  No
  - ARISA  Yes  No
  - State Worker's Compensation  Yes  No
  - Federal Worker's Compensation  Yes  No
  - Hospital Lien  Yes  No
  - Veteran's Administration Claims  Yes  No
  - Federal Employee Health Benefits Act  Yes  No
  - Welfare Liens  Yes  No
  - Mental Health Liens  Yes  No