



SHALLOWAY & SHALLOWAY, P.A.

ELDER AND SPECIAL NEEDS ATTORNEYS

Dedicated to preserving personal dignity and financial security.

Personal Injury Settlement Consulting

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

1. Is my client 62.5 years or older?
 Yes No
2. Is my client a Medicare beneficiary?
 Yes No
3. Is my client receiving SSDI or RRD?
 Yes No
4. Is my client in the process of appealing and/or refiling for SSDI or RRD benefits?
 Yes No
5. Has my client applied for SSDI or RRD or had my client applied and been denied but anticipates appealing the decision?
 Yes No
6. Does my client have Amyotrophic Lateral Sclerosis (ALS)?
 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. Is it anticipated that there will be future medical expense relating to my client's injury?
 Yes No

If the answer to question 8 is YES and the answer to any question between 1 and 7 is YES, then an MSA is required.