



**MARGOLIS
& BLOOM, LLP**
Planning for Life

QUICK SCREEN

IS A MEDICARE SET-ASIDE ARRANGEMENT (MSA) REQUIRED?

1. Is it anticipated that there will be future medical expenses relating to my client's injury?
 YES NO
2. Is my client a Medicare beneficiary?
 YES NO
3. Is my client receiving Social Security Disability Income?
 YES NO
4. Is my client receiving Railroad Retirement Disability (RRD) Benefits?
 YES NO
5. Has my client applied for SSDI or has my client applied and been denied, but anticipates appealing the decision?
 YES NO
6. Is my client in the process of appealing and refileing for SSDI benefits?
 YES NO
7. Is my client age 62 years or older?
 YES NO
8. Does my client have End Stage Renal Disease?
 YES NO
9. Does my client have Amyotrophic Lateral Sclerosis (ALS or Lou Gehrig's disease)?
 YES NO

If the answer to question 1 is YES and the answer to any one of questions 2 through 9 is YES, then an MSA is required.