



FUNDING INSTRUCTIONS MEDICARE SET-ASIDE ACCOUNTS

Education and training for the legal community on
protecting government benefits for the injured and at-risk

(855) 278-7681 | www.cptinstitute.org | setup@cpttrust.org

MEDIVEST

Make checks payable to:

Medivest for CPT Institute FBO [Trust Beneficiary Legal Name]

Send Check To:

Medivest Benefit Advisors, Inc.

P.O. Box 23910

Santa Barbara, CA 93121

AMETROS

Make checks payable to:

Ametros for CPT Institute FBO [Trust Beneficiary Legal Name]

Due to COVID-19, please funding checks should be sent to the address below until further notice:

Send Check To:

Ametros Financial Corporation

4894 Poplar Ave 2nd Floor

Memphis, TN 38117

Effective 03.25.2019



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BRIDGE POINTE NUQUEST

Professional administration:

The claimants always need to sign the MSA Custodial Agreement (this would have been generated based on the terms of the claimant's settlement so I cannot send a generic of this document) along with the claimant's signed W9 and 2 release forms: I have attached the generic version of the W9 form, BP General Release and BP Medicare Release. The claimant's W9 will need to be completed to match name of the Special Needs Trust. We do suggest that the forms are included or sent with the settlement documents so that the claimant can sign all the forms at the time of settlement so it does not cause a delay with getting the MSA Account activated for the claimant post-settlement.

To draft the MSA Custodial Agreement will need the following to be included with settlement documents:

- Defense counsel name with contact information
- Claimant attorney's name with contact information
- If structured settlement broker involved –need their name and a copy of the annuity quote
- Confirmation that when the claimant passes away the remaining funds are disbursed to CPT or to the claimant's estate

Payment instructions:

MSA fund (Seed or Lump sum) make check payable to **Bridge Pointe f/b/o name of claimant/Special Needs Trust Name to match W9**

Fee check is made payable to Bridge Pointe
Our mailing address is P.O. Box 915619, Longwood, FL 32791

Wiring instructions:

Bank: SunTrust Bank
25 Park Place NE
Atlanta, GA 30303
Account Name: Allocation Services Inc., D/B/A NuQuest Bridge Pointe
Account No.: 1000042193242
Routing/Aba No.: 061000104

Self-Administration – Non-NuShield –

Claimant has no forms to sign

Payment instructions:

The lifetime fee is \$2500
Make check payable to Bridge Pointe
Mailing address is P.O. Box 915619, Longwood, FL 32791

NuShield Self-Administration

The claimant is required to sign the SA agreement
The fee amount is based on the amount of the MSA calculated

Payment Instructions:

When notified of settlement Bridge Pointe will send the invoice
Make check payable to Bridge Pointe
Mailing address is P.O. Box 915619, Longwood, FL 32791

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