



# FUNDING

## Instructions to Fund Your Trust and Medicare Set-aside Account

### Funding Checklist

- ✓ An electronic copy of the executed trust documents.
- ✓ Client's signed Social Security card (some exceptions apply) with legal name consistent on trust documents and payee line for all incoming funds.
- ✓ If funding Medicare Set-Aside Accounts, please include "MSA" on the check memo line for payments.

### To fund the following:

- First-Party SNT
- Third-Party SNT
- Settlement Management Trusts
- Minors Trust

### Check

**Payee:**  
CPT Institute as TTEE FBO [Trust Beneficiary Legal Name]

**Send to:**  
CPT Institute  
13918 E Mississippi Ave #339  
Aurora, CO 80012

### Wire

Wire is available. Please reach out to your CPT Representative to provide you information.

## Medicare Set-Aside Accounts

### Medivest

- Make checks payable to: "Medivest Benefit Advisors, Inc., For CPT as TTEE FBO [TB 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 as TTEE FBO [Trust Beneficiary Legal Name]"
- Send Check To: Ametros Financial Corporation, PO Box 327, Memphis, TN 38101

If funding Medicare Set-Aside Accounts, please include "MSA" on the check memo line for payments.

## Common Funding Q&A

- ✓ The price for the one-time trust set-up and administration are withdrawn from the trust upon funding.
- ✓ Wire and Automated Clearing House (ACH) Direct Deposit are available but require trust documents on file before the request.
- ✓ Electronic copies of trust documents accepted.