

SYNERGY

MSAT – ADMINISTRATION SERVICES



// MEDICARE SET-ASIDE
PROFESSIONAL
ADMINISTRATION

// MEDICARE SET-ASIDE TRUSTS

// MEDICARE SET-ASIDE
SELF ADMINISTRATION
SUPPORT

Medicare Set-Aside Trust Administration Program

When a personal injury case is settled for a Medicare beneficiary, be it workers' compensation or liability, a Medicare Set Aside ("MSA") may be implemented. Once the decision is made to utilize an MSA, the question becomes how will it be administered?

Professional administration is the best alternative but who do you turn to for MSA administration services? How do you choose between providers? These aren't simple questions to answer. However, Synergy does have the answers and a solution to Medicare Set-Aside administration. Synergy's Medicare Set-Aside Administration program is different because it employs a Medicare Set-Aside Trust arrangement instead of a custodial agreement like most other professional administration programs.



Why Choose Us?

Synergy is a national settlement services company. Synergy provides a powerful combination of services giving injury victims and their attorneys a partner that can meet most any need at settlement.

Why choose Synergy's MSAT Administration Program?

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- **Experienced and trusted administrator & trustee services each account**
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- **Personalized counseling regarding set aside administration**
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- **Excellent customer service**
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- **A MSA card is issued to use at healthcare providers just like a health insurance card**

A Different Approach to Medicare Set-Aside Trust Administration

Most professional administrators of set-asides provide the service through a custodial arrangement. These custodial arrangements are contractual agreements and do not create the same level of fiduciary obligation on the part of the administrator as is possible with a trust. For example, one problem with a custodial setup is the protection afforded to the monies in the event of a bankruptcy of the set-aside custodian.

Because of the potential downsides to a custodial agreement, Synergy believes that a trust arrangement provides superior protections over a custodian arrangement. Accordingly, a better alternative is the creation of Synergy's Medicare Set-Aside trust (MSAT) agreement.

Synergy's MSAT is a formal trust agreement administered by a corporate trustee and a separate professional Medicare set-aside administrator.

With an MSAT, you get a trustee who has a fiduciary duty paired with a set-aside administrator who can handle the intricacies of managing set aside funds and reporting to CMS. This arrangement provides another layer of protection for the injury victim's funds.

Benefits of Medicare Set-Aside with Trust Administration

Benefits for the Medicare Beneficiary:

- Protects future Medicare eligibility for injury related care
- Provides proper administration of the set aside funds without the headaches of self administration
- Alleviates the burden of properly managing and reporting use of set aside funds
- On demand accessibility to Medicare Set-Aside administration trained professionals

Benefits for Attorneys and Parties to Litigation:

- Provides protection from legal malpractice claims
- Gives the Medicare beneficiary a highly capable resource and advocate for their health care
- Peace of mind knowing funds will be properly handled and spent on Medicare covered services for the injury
- Manages post settlement future care and avoids future liability

Benefits for Medicare:

- Insures Medicare's secondary payer status is protected
- Provides a mechanism to guarantee the funds are used only for Medicare covered injury related care
- Protects Medicare's future interests under the Medicare Secondary Payer Act

**Call us today at 877.242.0022
to see how we can help you!**

SYNERGY

SETTLEMENT SERVICES

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