



# SETTLEMENT CHECKLIST

PLAINTIFF'S ATTORNEY BEST PRACTICES

## QUICK SETTLEMENT & DISTRIBUTION CHECKLIST

- Qualified (Physical Injury) or Non-Qualified (Taxable)?
- Is Court Approval Needed? (Minor, Estate or Disabled)
- Edit Draft Release to Include Structure Language
- Set Funding Deadline for Cash & Structure Checks
- Lien Resolution
- Government Benefits Analysis / Preservation
- Medicare Set Aside (MSA)
- Lawsuit Loans to Repay

Issue Spotting  
During  
Settlement  
Negotiations

## CLIENT CONSIDERATIONS

- Fixed & Variable Structured Settlements (Distributive Income & Stability)
- Trust Services (Spendthrift, Government Benefits or Legacy Protection)
- Investment Needs (Indefinite Plans; Desire for Accumulation & Variable Growth)
- Insurance Needs
- Estate Planning / Probate Assistance

## ATTORNEY/LAW FIRM CONSIDERATIONS

- Attorney Fee Deferral & Loan Strategies
- Insurance Needs
- Investment / Estate Planning / Trust

Maximize Your Income  
&  
Manage Cash Flow

