

Settlement Checklist

This will assist you in confirming all necessary structure details.



Ownership

WHO WILL OWN THE STRUCTURE?

One insurer?/multiple insurers?

If neither, **Assignment required:**

- a) Will one assign whole structure?
- b) Will they assign pro-rata?
- c) Who will pay the fee(s)(*may be more than one*)?



Guarantee

IS THERE A REVERSION (insurer is beneficiary)?

IF YES,

- a) Has insurer specified amount to be structured?
- b) Who pays cost of the guarantee?
- c) Does insurer need to approve structure form?

IS IT A FULL REVERSION, OR

IS THERE A SHARED GUARANTEE (split between plaintiff and insurer)?

- Shared by time: 1st _____ yrs to _____, balance to _____
 - Shared by %: _____ % to plaintiff's beneficiaries and _____ % to insurer
- Will each pay for its own portion of the guarantee? Details: _____



Minutes of Settlement

DO THESE INCLUDE:

- Plaintiff's right to structure any or all of the settlement (or as otherwise outlined)?
- Name of structure firm to place the structure?
- Details of the checkpoints outlined above?
- Time frame for funding the structure?
- Statement of expenses incurred/benefits owed to date of settlement (AB claims)?
- Agreement of the insurer to pay benefits into the future? For how long (AB claims)?



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