

## Structured Settlement Decision Support Checklist

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1. Is there any restriction on the amount of the total settlement to be structured?
  - the claimant may structure any or all of the settlement
  - the claimant may structure an amount of no more/no less than \$ \_\_\_\_\_ / \_\_\_\_\_ % of the settlement
2. Is there any restriction on the structured settlement company to be used?
  - any or all of the settlement may be structured with the company of the claimant's choice
  - any or all of the settlement must be structured with \_\_\_\_\_ [name of the company]
  - other (e.g., split) \_\_\_\_\_ [describe]
3. Is there any restriction with respect to the life insurance companies permissible?
  - no, the structured settlement may be placed with any of the life companies presently in the structured settlement market
  - yes, the structured settlement may be placed only with \_\_\_\_\_ [name of life company(s) permissible]
4. Is there any restriction with respect to the ownership of the structured settlement?
  - no, the structured settlement will be owned by \_\_\_\_\_ [name of casualty insurer(s)]
  - yes, the ownership of the structured settlement will be assigned by \_\_\_\_\_ [name of casualty insurer(s)], with:
    - any or all fees borne by \_\_\_\_\_ [name of casualty insurer(s) and/or claimant]; or
    - a maximum of \$ \_\_\_\_\_ in fees borne by \_\_\_\_\_ [name of casualty insurer(s) and/or claimant]
5. Is there any time restriction with respect to the conveyance of funds for the structured settlement?
  - no
  - yes, funds for the structured settlement will be conveyed within \_\_\_\_\_ business days
6. Who has the right to name the beneficiary / secondary payee (or right to a reversionary interest)?
  - the claimant (at his/her own cost)
  - the casualty insurer (at its own cost)
  - other (e.g., some form of split) \_\_\_\_\_ [describe]
7. Does the casualty insurer reserve the right to approve the final structured settlement plan?
  - no
  - yes
8. Is there an agreement to continue to pay benefits until the structured settlement commences payments?
  - no, \_\_\_\_\_ [name of casualty insurer(s)] agrees to pay all outstanding benefits to the date of settlement
  - yes, \_\_\_\_\_ [name of casualty insurer(s)] agrees to pay benefits as incurred up to \_\_\_\_\_ [date of the first structured settlement payment]