SETTLEMENT INFO
Checklist

Getting ready to contact your settlement consultant about a case? Include this client information to expedite the process.

- ☐ Name*

- ☐ Date of Birth*

- ☐ Amount to Structure*

- ☐ Social Security Number or confirmation that the client has a valid Social Security Number*

- ☐ Type of case (e.g., wrongful death, car accident, etc.)

- ☐ Name of the entity paying the settlement

- ☐ Has the case settled?

- ☐ Is the client receiving government benefits? (If yes, please list)

- ☐ Does the client have ongoing medical needs or concerns, especially if it might affect life expectancy?

Not working with Monarch Structured Settlements yet?

Contact our team at info@monarch-us.com or learn more at www.monarch-us.com.

*Minimum required information to provide preliminary structured settlement options. Some structured settlement providers require confirmation of a Social Security Number before offering structured settlement options.