

Qualified Settlement Fund Administrator Evaluation Checklist for Planners



Provider Role Clarity

- Is the administrator a pure player fiduciary?
- Does the provider avoid selling insurance or competing products?

Attorney Education

- Can the administrator support attorney education on tax implications?
- Does the provider understand taxable and complex settlements?

Operational Strength

- Are distribution workflows efficient and reliable?
- Does the provider support multi claimant or staged planning?

Technology and Security

- Are systems secure, auditable, and scalable?
- Are approvals and records documented?

Transparency

- Are fees fully disclosed?
- Is reporting accessible to attorneys and planners?

Conflict Avoidance

- Are provider incentives aligned with client outcomes?
- Does the administrator avoid steering or sales driven influence?

Outcome Focus

- Does the administrator support solutions that increase net plaintiff recoveries?
- Does provider selection reduce risk for attorneys and planners?