

Pre-Settlement Funding Contract Checklist

Use this checklist before signing a lawsuit funding or settlement cash advance agreement. It is designed to help applicants and attorneys compare costs, rights, obligations, case outcome terms, privacy language, and dispute procedures.

Money terms

Check	Item	What to confirm	Notes
☐	Amount advanced	Confirm the exact cash amount being provided before any deductions or repayment charges.	
☐	Initial fees	Look for origination, processing, underwriting, document, wire, or setup fees.	
☐	Ongoing charges	Ask when charges begin and how often they are added.	
☐	Simple or compounding calculation	Confirm whether charges are calculated on the original amount or a growing balance.	
☐	Estimated payoff schedule	Request examples for 6, 12, 18, and 24 months or any timeline likely for your case.	
☐	Payoff cap	Ask whether the cap includes every fee and charge or only certain parts of the payoff.	

Contract rights and obligations

Check	Item	What to confirm	Notes
☐	Cancellation rights	Check whether there is a cancellation window and exactly how cancellation must be sent.	
☐	Attorney obligations	Confirm what your attorney must verify, sign, acknowledge, or pay from settlement proceeds.	
☐	Additional funding	Ask whether later advances create new fees, a new schedule, or a different payoff.	

Case outcome terms

Check	Item	What to confirm	Notes
☐	Case-loss terms	Read what happens if the case is lost, dismissed, or produces no recovery.	

Check	Item	What to confirm	Notes
[]	Low-settlement terms	Ask what happens if the recovery is lower than expected or liens are higher than expected.	
[]	Estimated payoff priority	Ask how attorney fees, medical liens, prior funding, and the new payoff are handled.	

Privacy and disputes

Check	Item	What to confirm	Notes
[]	Privacy and information sharing	Confirm who may receive case, medical, attorney, contact, and settlement information.	
[]	Complaint or dispute process	Find the provider contact, dispute procedure, and how payoff disagreements are handled.	

Important Reminder

CasePayNow is not a law firm and does not provide legal advice. Funding availability, timing, terms, and repayment depend on underwriting, attorney cooperation, state availability, signed agreement terms, and final approval. Ask your attorney to review any funding contract before signing.