

CLIENT NAME: _____ **Date:** _____
 Male Female Date of birth: _____ Height: _____' _____" Weight: _____
Tobacco Use: Never used Totally stopped Date stopped: _____ Use now Type of nicotine product: _____
Type of Coverage: Term UL Survivor Disability **Coverage Amount:** _____
Annual Income: _____ **Occupation/Job duties:** _____ **State of Residence:** _____
Anticipated Premium: _____

FAMILY HISTORY

Has proposed insured had a parent, brother or sister who had cancer, diabetes, stroke, heart or kidney disease or who died by suicide?
If yes, use separate sheet to provide this information, including age of onset and date of death

PROPOSED INSURED'S EXISTING INSURANCE			
Full Name of Company	Face Amount	Year Issued	Is Policy to be Replaced?

- Date of diagnosis: _____
- What was the most recent blood pressure reading? _____
- Please check any of the below that client has had:
 - Chest pain or coronary artery disease
 - Diabetes
 - Family history of: heart disease, high blood pressure, stroke
 - Abnormal lipid levels
 - TIA or stroke
 - Enlarged heart
 - Aneurysm
 - Peripheral vascular disease
 - Kidney disease
 - Overweight
- Has a stress electrocardiogram (treadmill test) been completed within the past year?
 - Yes; normal Date: _____
 - Yes; abnormal Date: _____
 - No
- Has client ever had an echocardiogram? No Yes
- Is client on any medications now? (accurate name, dosage, and reason)

(Accurate) Name of Medication	Dosage	Reason

7. Does client have any other major health issues? (additional questionnaires may be required) No Yes; please give details

