

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?

1. When was the surgery completed? _____

2. Please note type of valve surgery:

Valve replacement Valvuloplasty
 Commissurotomy Other _____

3. Please check the type (s) of valve disorder:

Aortic stenosis Mitral stenosis Mitral valve prolapse
 Aortic insufficiency Mitral insufficiency

4. Please note type of valve used if replaced:

Prosthetic (mechanical) Tissue (porcine or pig)

5. Have any of the following occurred?

Chest pain Heart failure Palpitations Dizziness/fainting Trouble breathing

6. Most recent cardiac follow up : Date: _____ Outcome: _____

Results:

EKG _____ Date: _____
 Stress Test _____ Date: _____
 Echocardiogram _____ Date: _____

7. Is there a history of any other disease in addition to the valve disorder (coronary artery disease, etc.)? No Yes; please give details

8. Is client taking any medication, including inhalers? (accurate name, dosage, and reason)

(Accurate) Name of Medication	Dosage	Reason

9. Are there any other health problems? (additional questionnaires may be required) No Yes; please give details
