

**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. At what age was it first diagnosed? \_\_\_\_\_

2. Is client on any medications now? (accurate name, dosage, and reason)

(Accurate) Name of Medication	Dosage	Reason

3. Does the client require mobility aids (e.g., cane, walker, wheelchair, etc.)? No  Yes ; please provide details:

4. Does the client require assistance with activities of daily living (e.g., bathing, dressing, etc.)?  No  Yes

5. Does the client experience seizures?  No  Yes; Type: \_\_\_\_\_ Frequency: \_\_\_\_\_ Most recent: \_\_\_\_\_

6. Has there ever been a diagnosis related to intellectual difficulties?  No  Yes; please provide details:

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