

**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 **Type of Coverage:**  Term  UL  Survivor

**Coverage Amount:** \_\_\_\_\_ **Anticipated Premium:** \_\_\_\_\_

**FAMILY HISTORY**

Has proposed insured had a parent, brother or sister who had cancer, diabetes, stroke, heart or kidney disease or who committed 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?

- List the diagnosis: \_\_\_\_\_
- Please indicate: Number of episodes \_\_\_\_\_ Date of last episode: \_\_\_\_\_
- Has client been hospitalized for psychiatric treatment?  No  Yes; please give details  
 \_\_\_\_\_  
 \_\_\_\_\_

- Does client have a history of any of the following associated conditions? Please check all that apply. (Additional questionnaires may be required)
  - Personality disorder
  - Psychotic disorder
  - Suicidal thought/attempt
  - Substance abuse (alcohol or drugs) (complete questionnaire)
  - Other psychiatric disorder

- Is the client currently working?  No  Yes; please list occupation  
 \_\_\_\_\_  
 \_\_\_\_\_

- Has any time been lost from work as a result of condition?  No  Yes; please give details  
 \_\_\_\_\_  
 \_\_\_\_\_

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

(Accurate) Name of Medication	Dosage	Reason

- Does client have any other health issues? (additional questionnaires may be required)  No  Yes; please give details  
 \_\_\_\_\_  
 \_\_\_\_\_