

**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?

- 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?
  - No  Yes; normal Date: \_\_\_\_\_
  - Yes; abnormal Date: \_\_\_\_\_
- 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

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