Generic Cardiac Questionnaire

SECTION I: AGENT INFORMATION

Full Name of Agent

Address Line 1

Address Line 2

City, State, Zip

E-Mail

Business Phone

Cell Phone

Home Number

Fax Number

SECTION II: CLIENT BACKGROUND INFORMATION

Full Name	

Sex   ◇ Male
      ◇ Female

Date of Birth

Height

Weight (if weight changed in the last 12 months, please indicate)

Type of Product   ◇ Term Life
      ◇ Universal Life
      ◇ Whole Life
      ◇ Second to Die
      ◇ Variable Life

Coverage Amount

Desired Premium Range

Occupation (If not currently employed, explain i.e. Retired, Disabled, Social Security Disability, Workmans Comp)

Ever used nicotine   ◇ Yes
      ◇ No

Still using nicotine   ◇ Yes
      ◇ No
      ◇ Not Applicable

Date Stopped

List types of nicotine used

SECTION III: CLIENT MEDICAL INFORMATION

Most significant medical problem

Date condition first diagnosed

Is client currently seeing a doctor for the above condition

◇ Yes

◇ No

Date of last visit

Most recent BP reading

List all medications, including dosage and frequency, that the client is currently taking:

List any immediate relatives (parents or siblings) who have died of heart disease, cancer, or diabetic complications prior to the age of 60:

Describe any other impairment, medical or otherwise, which may affect the underwriting process:

Prior company action (Name of company, rating, premium)

Types and dates of surgery or hospital treatment?

SECTION IV: GENERAL HEART CONDITION QUESTIONS

Has the client ever experienced syncope (fainting), palpitations, or dizziness? If so, provide details:

Describe any restrictions placed on the clients activities:

What was the date and type (treadmill, nuclear treadmill, chemically induced, etc) of the clients last stress test?

What were the results of that test?

Does the client carry a pill (nitroglycerin) or does client ever wear a patch for chest pain?

◇ Yes

◇ No

Does the client suffer from Angina (chest pain)? If so, please provide official diagnosis:

Does the client carry nitroglycerine pills? If so, when was the last time they used them?