

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

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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?

1. List date(s) of the heart attack(s): _____

2. Has the client had any of the following:

Echocardiogram Date: _____

Coronary catheterization Date: _____

Coronary angioplasty Date: _____

Bypass surgery Date: _____

Heart failure Date: _____

Arrhythmias Date: _____

3. Has a follow-up stress (exercise) ECG been completed since the heart attack? No Yes; please give details

4. Please check if your client has had any of the following:

Abnormal lipid levels Irregular heartbeats*

Peripheral vascular disease*

Overweight Diabetes; age of onset: _____

Cerebrovascular or carotid disease

High blood pressure Elevated homocysteine

*These conditions require an additional questionnaire to be completed, please request.

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

(Accurate) Name of Medication	Dosage	Reason

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