

**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 first diagnosed: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_
- How often does your client visit his/her physician?  
When was the last visit? \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_
- The client's diabetes is controlled by:
  - Diet alone
  - Oral medication (medication and doses) \_\_\_\_\_
  - Insulin (amount and units/day) \_\_\_\_\_
- Please give the most recent blood sugar reading: \_\_\_\_\_
- Does client monitor his/her own blood sugar? \_\_\_\_\_
- If available, please give the most recent glycohemoglobin (BhA1C) or fructosamine level: \_\_\_\_\_
- Please check if your client has (had) any of the following:
 

|  |   |  |
|--|---|--|
| <input type="checkbox"/> Chest pain or coronary artery disease | <input type="checkbox"/> Protein in the urine | <input type="checkbox"/> Elevated lipids |
| <input type="checkbox"/> Overweight                            | <input type="checkbox"/> Neuropathy           | <input type="checkbox"/> Kidney disease  |
| <input type="checkbox"/> Retinopathy                           | <input type="checkbox"/> Abnormal ECG         | <input type="checkbox"/> Hypertension    |
- 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  
\_\_\_\_\_  
\_\_\_\_\_