

**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?

- How long has this abnormality been present? \_\_\_\_\_
- Please check the type(s) of valve disorder present:  
 Mitral stenosis     Mitral regurgitation     Mitral valve prolapse
- Have any of the following occurred?  
 Chest pain                       No     Yes  
 Trouble breathing               No     Yes  
 Heart failure                       No     Yes  
 Palpitations                       No     Yes  
 Atrial fibrillation/flutter       No     Yes
- Is there a history of any other heart disease in addition to the mitral valve disorder (problems with other valves, coronary artery disease, etc.)?  
 No     Yes; please give details

- Have additional studies been completed? (check all that apply)  
 Echocardiogram                  Date: \_\_\_\_\_  
 Cardiac catheterization        Date: \_\_\_\_\_  
 None

- List all medications client is taking. (accurate name, dosage, and reason)

(Accurate) Name of Medication	Dosage	Reason

- Are there any other health problems? (additional questionnaires may be required)  No     Yes; please give details