

**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? |
|                                       |             |             |                           |
|                                       |             |             |                           |

1. Date of first diagnosed: \_\_\_\_\_

2. Please note the functional stage of the client currently:

- Stage I unilateral involvement
- Stage II bilateral involvement but normal stance
- Stage III bilateral involvement with mild postural imbalance, but able to lead an independent life
- Stage IV bilateral involvement with postural instability; requires substantial help
- Stage V severe disease; restricted to bed or wheelchair

3. Has there been any evidence of progression?  No  Yes; please give details

\_\_\_\_\_

4. Please note if any of the following have occurred (check all that apply):

- Dementia  Recurrent infections
- Memory problems  Falls
- Aspiration  Recurrent injuries
- Pneumonia  Depression

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

| (Accurate) Name of Medication | Dosage | Reason |
|-------------------------------|--------|--------|
|                               |        |        |
|                               |        |        |
|                               |        |        |

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

\_\_\_\_\_