

**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  Disability **Coverage Amount:** \_\_\_\_\_  
**Annual Income:** \_\_\_\_\_ **Occupation/Job duties:** \_\_\_\_\_ **State of Residence:** \_\_\_\_\_  
**Anticipated Premium:** \_\_\_\_\_

**FAMILY HISTORY**

Has proposed insured had a parent, brother or sister who had cancer, diabetes, stroke, heart or kidney disease or who died by 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 of diagnoses: \_\_\_\_\_
- Type of lung disease:  
 Interstitial lung disease; type \_\_\_\_\_  
 Chronic bronchitis  
 Emphysema  
 Asthma
- Was a biopsy done?  No  Yes
- Has client improved since diagnosis?  No  Yes
- Has client ever been hospitalized for this condition?  No  Yes; please give details  
 \_\_\_\_\_  
 \_\_\_\_\_

- Has client ever smoked?  
 Yes; currently smokes \_\_\_\_\_ (amount/day)  
 Yes; smoked in the past but quit \_\_\_\_\_ (date)  
 Never smoked

- Have pulmonary function tests (breathing test) ever been done?  No  Yes; please give most recent test results  
 \_\_\_\_\_  
 \_\_\_\_\_

- Does client have any abnormalities on an ECG or X-ray?  No  Yes; please give details  
 \_\_\_\_\_  
 \_\_\_\_\_

- 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  
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