

Agent Name: _____ Agent Phone: _____ Agent Email: _____

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 UL

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 of the initial treatment or diagnosis? _____
- What is client's: Martial status: _____ Occupation: _____
 Length of employment: _____
- Is client an active member of a drug use recovery group? No Yes; how long? _____
- Has client ever joined and then left a drug use recovery group? No Yes; please give details

- What drug(s) were used or abused? (name of drug and dates of usage)

- Were there any relapses from sobriety/abstinence? No Yes; please list dates

- Has client ever been convicted of any drug-related activity? No Yes; please give details

- Have there been physical complications or additional psychiatric problems? No Yes; please give details

- What is client's current level of alcohol consumption? _____
- Is client taking any medications? (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

The above information is for preliminary underwriting purposes only and will not be made part of any contract.