

Client Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

 Gender:  Male  Female Height: \_\_\_\_\_ Weight: \_\_\_\_\_

Tobacco Usage: \_\_\_\_\_ Coverage Information: \_\_\_\_\_

<input type="checkbox"/> Never	Date Stopped: _____	Type: <input type="checkbox"/> Term	<input type="checkbox"/> UL	<input type="checkbox"/> IUL
<input type="checkbox"/> Former		<input type="checkbox"/> WL	<input type="checkbox"/> VUL	<input type="checkbox"/> Survivorship
<input type="checkbox"/> Current		Type: _____	Face Amount: _____	Premium Tolerance: _____

Proposed Insured's Existing Insurance			
Insurance Company	Face Amount	Year Issued	Replacement (Yes/No)

1. List the date(s) of the angioplasty (PTCA): \_\_\_\_\_

2. How many vessels required intervention? \_\_\_\_\_

 3. Why was the angioplasty done? (Please provide specific detail. Attach additional sheets as needed.)  
 \_\_\_\_\_  
 \_\_\_\_\_

 4. Does client's family have any history of heart disease?  No  Yes

5. Has the client had either of the following?

<input type="checkbox"/> Heart Attack:	<input type="checkbox"/> No	<input type="checkbox"/> Yes	If Yes, date: _____
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<input type="checkbox"/> Bypass Surgery:	<input type="checkbox"/> No	<input type="checkbox"/> Yes	If Yes, date: _____
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6. Has a follow-up stress test been completed since recovery?

<input type="checkbox"/> No	
<input type="checkbox"/> Yes, Normal	Date: _____
<input type="checkbox"/> Yes, Abnormal	Date: _____

 7. Has the client had any chest discomfort since the procedure?  No  Yes

 If yes, please provide details: \_\_\_\_\_  
 \_\_\_\_\_

8. Has the client had any of the following?

<input type="checkbox"/> Abnormal lipid levels	<input type="checkbox"/> Carotid Disease	<input type="checkbox"/> Cerebrovascular Disease
<input type="checkbox"/> Diabetes	<input type="checkbox"/> Elevated Homosysteine	<input type="checkbox"/> High Blood Pressure
<input type="checkbox"/> Irregular Heartbeat	<input type="checkbox"/> Overweight	<input type="checkbox"/> Peripheral Vascular Disease

9. Please list current medications (including aspirin):

Name of Medication	Dosage	Reason

 10. Are there any other health issues? (Additional Questionnaires may be required)  No  Yes

 If yes, please provide details: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_