

Client Name: _____ Date of Birth: _____

 Gender: Male Female Height: _____ Weight: _____

Tobacco Usage:

-
- Never
-
-
- Former
-
-
- Current

Date Stopped: _____

Type: _____

Coverage Information:

- Type:
-
- Term
-
- UL
-
- IUL
-
-
- WL
-
- VUL
-
- Survivorship

Face Amount: _____

Premium Tolerance: _____

Proposed Insured's Existing Insurance

Insurance Company	Face Amount	Year Issued	Replacement (Yes/No)

1. Date of Diagnosis _____

2. How often does your client visit his/her physician? _____

3. Date of last visit: _____

4. The client's diabetes is controlled by:

-
- Diet alone
-
-
- Oral medication (medication and dosage): _____
-
-
- Insulin (amount and units/day): _____

5. Please give the most recent glycohemoglobin (BhA1C): _____

6. Please check if your client has (had) any of the following:

- | | | |
|--|---|--|
| <input type="checkbox"/> Chest pain or CAD | <input type="checkbox"/> Protein in the urine | <input type="checkbox"/> Elevated lipids |
| <input type="checkbox"/> Overweight | <input type="checkbox"/> Neuropathy | <input type="checkbox"/> Kidney disease |
| <input type="checkbox"/> Retinopathy | <input type="checkbox"/> Abnormal EKG | <input type="checkbox"/> Hypertension |

7. Please list current medications

Name of Medication	Dosage	Reason

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

If yes, please provide details: _____
