

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

 Current Type: _____ Face Amount: _____

Premium Tolerance: _____

Proposed Insured's Existing Insurance

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

1. Date of the episode(s)? _____

2. Were any of the following studies completed?

<input type="checkbox"/> Carotid Ultrasound	Date: _____
<input type="checkbox"/> Head CT or MRI	Date: _____
<input type="checkbox"/> Echocardiogram	Date: _____

 3. Was the client hospitalized? No Yes; please provide details _____

4. When did the client last see their doctor for evaluation? _____

5. Please check any of the following that your client has had:

<input type="checkbox"/> Coronary Artery Disease	<input type="checkbox"/> Diabetes	<input type="checkbox"/> Elevated Cholesterol	<input type="checkbox"/> Heart Attack
<input type="checkbox"/> High Blood Pressure	<input type="checkbox"/> Peripheral Vascular Disease	<input type="checkbox"/> Stroke	

 6. Has surgery ever been done on any carotid artery(ies)? No Yes; please provide details _____

7. Give the date and results of the most recent blood pressure readings:

Date: _____ Results: _____

 8. Are there any residuals (limitation of movement, speech or vision)? No Yes; please provide details _____

9. Please list current medications (including inhalers):

Name of Medication	Dosage	Reason

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

If yes, please provide details: _____