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**In order to provide the most accurate quote for your client, please answer the following questions with as much detail as possible. This will enable us to provide you with the best offer from our carriers.**

Agent name: \_\_\_\_\_

Client name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Coverage Period: 10 yr 15 yr 20 yr 30 yr ROP UL  
Amount of Coverage: \_\_\_\_\_

Tobacco Use: No Yes Type \_\_\_\_\_ Amount per week \_\_\_\_\_  
Date of last use: \_\_\_\_\_

Height: \_\_\_\_\_ Weight: \_\_\_\_\_

Family History: Has any Parent or Sibling ever had cancer, heart disease or death on or before age 60? No Yes (provide details) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What medications is the client currently taking, why, how long, and dosage:  
\_\_\_\_\_  
\_\_\_\_\_

Foreign travel planned next 12 months (Subject to state limitations):  
\_\_\_\_\_  
(Please provide country, length of stay and reason for visit)

Has the client ever been declined or rated for life insurance? No Yes  
Details: \_\_\_\_\_

PLEASE CONTINUE TO PAGE 2 FOR ADDITIONAL QUESTIONS.

Coronary Artery Disease: 1) date of occurrence 2) heart attack? 3) bypass, stent, angioplasty-how many vessels? 4) when was the last comprehensive coronary exam and were the results normal?

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Cancer: 1) Location of tumor \_\_\_\_\_  
2) Metastatic  No  Yes  
3) Grade and Stage of tumor \_\_\_\_\_  
4) Dates of treatment \_\_\_\_\_

Diabetes: 1) Age of diagnosis \_\_\_\_\_  
2) Current treatment \_\_\_\_\_  
3) Most recent blood sugar reading \_\_\_\_\_ Most recent A1C reading \_\_\_\_\_

Drug/Alcohol Abuse:  No  Yes Date(s) and Type(s) of Treatment \_\_\_\_\_

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Driving History: 1) DUI  No  Yes Date of conviction(s) \_\_\_\_\_  
2) Moving violations  No  Yes Type(s) and Date(s): \_\_\_\_\_

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Bankruptcy:  No  Yes Type of Bankruptcy and Date of Discharge: \_\_\_\_\_

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Dangerous Hobbies/Activities:  No  Yes What type of activity/hobby and frequency: \_\_\_\_\_

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Physician(s): Please provide name(s) and phone number(s) \_\_\_\_\_

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Additional Information:

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THANK YOU FOR YOUR BUSINESS