

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?

1. Does client presently consume alcoholic beverages? No Yes, If yes, please list

Beer: Quantity _____ oz. per day week month (select one)

Wine: Quantity _____ oz. per day week month (select one)

Liquor: Quantity _____ oz. per day week month (select one)

2. What was the date of initial treatment or diagnosis? _____ / _____ / _____

3. Were there any relapses from sobriety/abstinence? ☐ No ☐ Yes; please provide details and dates

4. Were there any legal problems (such as DUI) or other? ☐ No ☐ Yes; please provide details and dates

5. Have there been physical complications or additional psychiatric problems? ☐ No ☐ Yes; please provide details and dates, including use of other substances such as marijuana or cocaine

6. Please list current medications (accurate name, dosage, and reason):

(Accurate) Name of Medication	Dosage	Reason

7. Does client currently participate in a group such as Alcoholics Anonymous? No Yes

8. What is client's: Marital status: _____ Occupation: _____

Length of employment: _____

9. Are there 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.