



2100 West End Avenue Suite 780 Nashville, TN 37203

**Client Screening General Questionnaire**

Please complete the following questions in as much detail as possible. This information is the first step in the assessment and negotiation process. Fax to 615-620-1877 attn: Joe or email [mrisner@crproducers.com](mailto:mrisner@crproducers.com)

**Agent name and email:**

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

\_\_\_\_\_  
**Face amount requested**\_\_\_\_\_

**Coverage Period** 10 yr 15 yr 20 yr 30 yr Universal Life

**Tobacco User:** No Yes Type \_\_\_\_\_ Amount per week \_\_\_\_\_

**Height**\_\_\_\_\_ **Weight**\_\_\_\_\_

**Family History: Any Parent or Sibling have cancer or heart *history* or *death* before age 60 (Provide details)**\_\_\_\_\_

**Foreign travel planned next 12 months**\_\_\_\_\_

**What medication is the client currently taking, why, and how long**  
\_\_\_\_\_

**What is the client's most significant medical history and how was it treated**  
\_\_\_\_\_

**Any other medical and non-medical issues**  
\_\_\_\_\_

**Is there anything positive the underwriter should know (like exercise, diet, vitamins, annual check-ups)**

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**Additional Information for Specific Medical Conditions**

**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: Ideally we need a copy of the operative and post-operative pathology reports. At minimum we need: 1) name and location of tumor, 2) treatment, 3) grade and 4) stage.**

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**Diabetes: 1) age diagnosed, 2) A1C reading, 3) complications.**

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**Hepatitis C: 1) liver biopsy? 2) treatment? 3) are liver function tests normal? 4) is viral load normal? 5) Is the hep-c virus in remission?**

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**Neurology (Stroke and TIA): describe any residual impairment and date of onset**

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**Multiple Sclerosis: is it “relapsing remitting”/stable (flair-ups are ok as long as recovery is back to “normal”) or progressive? \_\_\_\_\_**

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**Drug and Alcohol Treatment: 1) age and length of stay, 2) currently in AA, 3) drug and alcohol?, 4) occupation and duties, 5) married? 6) dependent children? alcohol?**

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**Cognitive impairment: 1) is there a diagnosis, 2) was a mini-mental exam performed (short term memory oral test)?, 3) was neurological exam done?, 4) are they taking aricept or excelon? 5) are they working and/or active outside the home?**

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**Kidney disorder or loss of a kidney: Are kidney function tests normal?**

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**Transplant surgery: companies will only consider kidney transplant and only if the kidney function tests are normal. All other organ transplants are uninsurable.**

**Comments: \_\_\_\_\_**