

## Medical Questionnaire

**PRIMARY PROPOSED INSURED**

Date: \_\_\_\_\_

1. Last Name \_\_\_\_\_
2. First Name \_\_\_\_\_
3. In which state do you maintain your primary residence? \_\_\_\_\_
4. Do you maintain a residence in any other state? Y ☐ N ☐ If yes, which one(s)?  
\_\_\_\_\_
5. Are you a citizen of the United States? Y ☐ N ☐ If not, of which country are you a citizen?  
\_\_\_\_\_  
Do you have a green card? Y ☐ N ☐
6. Your occupation: \_\_\_\_\_
7. Annual Income: \_\_\_\_\_
8. In which state is your employer located? \_\_\_\_\_

**Health History**

1. Gender \_\_\_\_\_
2. Date of Birth \_\_\_\_\_
3. Height \_\_\_\_\_
4. Weight \_\_\_\_\_
5. Have you lost or gained more than 10 lbs in the last year? Y ☐ N ☐  
If so, what caused the weight change? \_\_\_\_\_
6. Do you smoke any form of tobacco (cigarettes, cigars or pipes)? Y ☐ N ☐
  - a. If so, what do you smoke and how often do you smoke it? \_\_\_\_\_
  - b. If not, do you chew tobacco? Y ☐ N ☐
  - c. Did you ever smoke? Y ☐ N ☐ If so, date you last smoked? \_\_\_\_\_
  - d. Do you wear a nicotine patch? Y ☐ N ☐
7. Have you ever used marijuana, heroin, cocaine, or any other drugs? Y ☐ N ☐  
If so, when was the last time? \_\_\_\_\_
8. Do you drink alcohol? Y ☐ N ☐ If so, what do you drink, how much of it do you drink, and how often do you drink it? \_\_\_\_\_

9. Have you or anyone in your immediate family - just your parents, brothers and sisters - had cancer, diabetes or heart disease?

If so, please provide the following information for each person: (use a separate sheet of paper for more room)

Person A

Relation to You: \_\_\_\_\_

Type of Illness: \_\_\_\_\_

Age of Onset: \_\_\_\_\_ Date of Onset: \_\_\_\_\_

Age, if Living: \_\_\_\_\_ or Age at Death: \_\_\_\_\_

Stage (if Cancer): \_\_\_\_\_

Treatment Type: \_\_\_\_\_

Person B

Relation to You: \_\_\_\_\_

Type of Illness: \_\_\_\_\_

Age of Onset: \_\_\_\_\_ Date of Onset: \_\_\_\_\_

Age, if Living: \_\_\_\_\_ or Age at Death: \_\_\_\_\_

Stage (if Cancer): \_\_\_\_\_

Treatment Type: \_\_\_\_\_

## Additional Health History

Have you ever been diagnosed or treated for (yes/no):

a. Alcohol Abuse	Y <input type="checkbox"/> N <input type="checkbox"/>	j. Heart Disease	Y <input type="checkbox"/> N <input type="checkbox"/>
b. Asthma	Y <input type="checkbox"/> N <input type="checkbox"/>	k. Hepatitis	Y <input type="checkbox"/> N <input type="checkbox"/>
c. Bipolar Disorder	Y <input type="checkbox"/> N <input type="checkbox"/>	l. High Blood Pressure	Y <input type="checkbox"/> N <input type="checkbox"/>
d. Cancer	Y <input type="checkbox"/> N <input type="checkbox"/>	m. High Cholesterol	Y <input type="checkbox"/> N <input type="checkbox"/>
e. Crohns Disease/Colitis	Y <input type="checkbox"/> N <input type="checkbox"/>	n. HIV	Y <input type="checkbox"/> N <input type="checkbox"/>
f. Depression	Y <input type="checkbox"/> N <input type="checkbox"/>	o. Kidney Disease	Y <input type="checkbox"/> N <input type="checkbox"/>
g. Diabetes	Y <input type="checkbox"/> N <input type="checkbox"/>	p. Respiratory Disease	Y <input type="checkbox"/> N <input type="checkbox"/>
h. Drug abuse	Y <input type="checkbox"/> N <input type="checkbox"/>	q. Sleep apnea	Y <input type="checkbox"/> N <input type="checkbox"/>
i. Epilepsy/Seizure Disorder	Y <input type="checkbox"/> N <input type="checkbox"/>		

Please explain any yes answers:

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Why have you visited a doctor or hospital in the last 10 years? \_\_\_\_\_

\_\_\_\_\_

Have you ever been declined or rated on a prior application for life insurance? Y ☐ N ☐

If so, what was the reason?

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## Medication

Are you current taking any prescription medication? If so, please list below:

Name \_\_\_\_\_ Dosage \_\_\_\_\_ Reason : \_\_\_\_\_

Name \_\_\_\_\_ Dosage \_\_\_\_\_ Reason : \_\_\_\_\_

Name \_\_\_\_\_ Dosage \_\_\_\_\_ Reason : \_\_\_\_\_

## Additional Information

1. Driver's License Information: License # \_\_\_\_\_

License State: \_\_\_\_\_ Issue Date: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

2. How many moving violations on your driver's license have you had in the last 10 years?

\_\_\_\_\_

3. Have you ever been charged or convicted of a felony? Y ☐ N ☐

4. Do you participate in scuba diving, auto racing, piloting an aircraft, or mountain climbing? Y ☐ N ☐

5. Do you ever travel outside of the United States for business or pleasure? Y ☐ N ☐

If so, where do you go? \_\_\_\_\_

6. Is there any other information you think we should know? Y ☐ N ☐

If yes, please explain below or attach another page.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Beneficiary/Insurance Information

1. Who would be the beneficiary of your policy? \_\_\_\_\_

2. Will the benefit be used to replace your income? Y ☐ N ☐

3. Will the benefit also be used to pay off a mortgage or other debt? ? Y ☐ N ☐

4. How much insurance do you need to have? \_\_\_\_\_

5. For how long do you want to have this protection in force (i.e., 20 years, 30 years, the rest of my life)?

\_\_\_\_\_

\_\_\_\_\_  
Signature of Proposed Insured

\_\_\_\_\_  
Date