

- 1) Nothing In Place
- 2) Something In Place, But Need More
- 3) Have Everything, Leave More Behind

CLIENT PROFILE

Name:
Age/DOB:
Retired / Disabled / Working:
Social Security / Pension / Both:
Life Insurance:
401K / IRA / Stocks / Managed Accts:
Burial / Cremation

QUALIFIED DISCOUNTS

Smoker: Yes / No
Credit Union / Bank / SS Direct Express

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HEART - Attack, Stroke, Cardiomyopathy, Congestive Heart Failure, Stents, Bypass, AFib, Angioplasty, Angina, Heart Valve Disease, Heart Failure or Disease
LUNGS - Asthma, COPD, Emphysema
LIVER - Cirrhosis, Hepatitis A B or C, or Liver Failure
KIDNEY - Chronic Kidney Disease, Kidney Failure
MISC - High Blood Pressure, Cholesterol, (Diabetes - Pills / Insulin / Neuropathy / Diabetic Coma / Insulin Shock / Amputation), Tumors, Cancer, Pain Meds, Lupus, Parkinsons, Anxiety, Depression
KNOCKOUTS - Alzheimer, Dementia, ALS, Terminal Illness, Dialysis, HIV/AIDS, Organ Failure, Assisted Living Facility, Hospice, Organ Transplant, Confined In Wheelchair Or Hospital Bed

MEDICAL UNDERWRITING

Prescriptions, Hospitalizations and Surgeries

Height and Weight:

MEDICAL UNDERWRITING

Prescriptions, Hospitalizations and Surgeries

Height and Weight:

Name of Beneficiary:
DOB:
Relationship to Insured:

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