

Health Questionnaire/Informal Application

Agent Name: _____ Client Name: _____ DOB: _____

Male Female Height: _____ ft _____ in Weight: _____ lbs Weight lost in past year: _____ lbsIntended face amount: \$ _____ Term UL SUL Has the client ever used nicotine? Yes No Product: _____ Frequency: _____ Last Used: _____

Has this case been rated, declined by another carrier, or shopped? Please provide details.

Are specific carriers being considered? Please list in order of preference.

Is the agent aware of any underwriting issued (e.g., aviation, occupation, travel)

Is there a parent or sibling who has had cancer , diabetes , stroke , or heart disease ? If yes, please check the appropriate condition, list the relationship, and provide age at diagnosis and/or death.

Do you have diabetes? Yes No Date of diagnosis: _____ Current A1C: _____ Type I Type II

Current BP: _____ Total Cholesterol Level: _____ HDL: _____ LDL: _____

Known medical conditions with details (e.g., cardiac issues, cancer, complications of diabetes).

Health Questionnaire/Informal Application Continued

Please list medications, dosages and reason taken below (please use additional sheets if needed):

Medication	Dosage	Reason for taking

Are you providing medical records? Yes No

Please list any doctors below for which records have not been provided:

Name	Phone Number	Address	Last seen	Type of physician

For life applications with a face amount of \$10,000,000 or more, we will assist you in seeking medical record documentation from physicians, hospitals, etc. Please note however, if the case does not go formal with one of our carriers, you will be responsible for all expenses incurred on behalf of your client.

Due to HIPAA compliance regulations, copies of any medical records which were obtained by Annuity Advisors will not be made available at any time to anyone (including the agent and applicant), regardless of the outcome of the application process.

Please sign below to accept and agree with this policy.

Print Name
Signature
Date