MEDICAL HISTORY QUESTIONNAIRE: CORONARY ARTERY DISEASE

Client Name: _____ Date of Birth: _____

Gender: ☐ Male ☐ Female Height: _____ Weight: _____

Tobacco Usage:

☐ Never

☐ Former Date Stopped: _____

☐ Current Type: _____

Coverage Information:

Type: ☐ Term ☐ UL ☐ IUL

☐ WL ☐ VUL ☐ Survivorship

Face Amount: _____

Premium Tolerance: _____

Proposed Insured's Existing Insurance			
Insurance Company	Face Amount	Year Issued	Replacement (Yes/No)

1. List the date(s) of diagnosis: _____

2. Type of Coronary Artery Disease: _____

3. Does the client's family have a history of heart disease? ☐ No ☐ Yes, list family members and details

4. Has the client had either of the following?

Bypass Surgery:	☐ No ☐ Yes	If Yes, date:	_____
Coronary Angioplasty:	☐ No ☐ Yes	If Yes, date:	_____
Heart Attack:	☐ No ☐ Yes	If Yes, date:	_____
Heart Failure:	☐ No ☐ Yes	If Yes, date:	_____
Valve Surgery:	☐ No ☐ Yes	If Yes, date:	_____

5. Has the client had any of the following?

☐ Abnormal lipid levels	☐ Carotid Disease	☐ Cerebrovascular Disease
☐ Diabetes	☐ Elevated Homosyteine	☐ High Blood Pressure
☐ Irregular Heartbeat	☐ Overweight	☐ Peripheral Vascular Disease

6. Please list current medications:

Name of Medication	Dosage	Reason

7. Are there any other health issues? (Additional Questionnaires may be required) ☐ No ☐ Yes

If yes, please provide details:

CBIZ INDIVIDUAL INSURANCE SOLUTIONS