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Client Questionnaire

Client Information

Today's Date: _____

First Name	MI	Last Name	Date of Birth	Citizenship
SSN		Driver License #	State of Issue	Expiration
Home Phone		Cell Phone	Business Phone	State/Country of Birth
Email			Contact Preference? <input type="checkbox"/> Email <input type="checkbox"/> Phone <input type="checkbox"/> Text	
Home Address				How Long? _____ Yrs _____ Mo
Employer Name				How Long? _____ Yrs _____ Mo
Employer Address			Title	Occupation
Annual Earned Income		Annual Unearned Income	Net Worth <input type="checkbox"/> Individual <input type="checkbox"/> Joint	
Do you currently have life insurance? <input type="checkbox"/> Yes <input type="checkbox"/> No		If yes, are you applying for insurance to replace it? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Insurance Carrier:		Type: <input type="checkbox"/> Term <input type="checkbox"/> Permanent		
Face Amount:		Is this a 1035 Exchange? <input type="checkbox"/> Yes <input type="checkbox"/> No		

Spouse/Partner Information

First Name	MI	Last Name	Anniversary Date	Date of Birth	Citizenship
SSN		Driver License #	State of Issue	Expiration	
Home Phone		Cell Phone	Business Phone	Contact Preference? <input type="checkbox"/> Email <input type="checkbox"/> Phone <input type="checkbox"/> Text	
Email			What is the face amount of life insurance in force on spouse/partner?		

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Children or Dependent Information (Even If Not Still Living At Home)

First and Last Name	Date of Birth	Relationship	SSN
First and Last Name	Date of Birth	Relationship	SSN
First and Last Name	Date of Birth	Relationship	SSN
First and Last Name	Date of Birth	Relationship	SSN

Notes (Please include special needs, etc.)

Advisors

CPA Name	Firm	Contact Phone	Contact Email
Insurance Agent	Firm	Contact Phone	Contact Email
Banker	Firm	Contact Phone	Contact Email
Lawyer	Firm	Contact Phone	Contact Email
Other Financial Advisor	Firm	Contact Phone	Contact Email

Parents' Information

Is there a history of diabetes, cancer, or heart disease in parents? If yes, please describe below:

Father: Age and health status –or– age at death and cause

Mother: Age and health status –or– age at death and cause

Additional family circumstances that should be discussed or taken into consideration:

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Medical Information

Male Female

Height: _____ Weight: _____ Indicate change in weight from last year: _____

Primary Physician: _____

Primary Physician's Address: _____

Health Care Provider (Kaiser, Sharp, UCSD, VA, etc.): _____

Please select the following, if applicable:

Complication or disorder of...

- Heart or blood vessels, incl. chest pain, high blood pressure
- Stomach, liver, intestines, gallbladder, kidney or urinary tract
- Seizures, fainting, dizziness, epilepsy, stroke, or paralysis
- Nervous, mental or emotional disorder, or received counseling for any emotional condition
- Tumor, cancer, cysts or any disorder of the lymph nodes
- Back, spine, muscles, nerves, bones joints, incl. arthritis or gout
- Endocrine or glandular, incl. diabetes or thyroid
- Blood incl. anemia
- Respiratory system, incl. asthma, emphysema, sleep apnea, shortness of breath
- Eyes, ears, nose, throat
- Reproductive system or complications of pregnancy
- Allergies or skin disorders
- Mental or physical condition not listed above

Have you...

- Been diagnosed or treated for AIDS or a related condition
- Had surgery that has not been completed
- Been a patient in a hospital, sanatorium or other medical facility
- Been advised to have an EKG, x-ray, blood, urine or other diagnostic test
- Been under the treatment or care of a health care practitioner for any reason
- Ever used hallucinogenic or narcotic drugs not prescribed by a doctor
- Ever been treated for drug abuse or been advised to limit use of any medication
- Ever been treated for alcohol abuse or been advised to limit use of alcohol

Please provide details to any checked boxes...

Are you currently taking medication of any kind? Yes No

If yes, please list and indicate whether the medication is prescribed or over-the-counter and the reason for taking

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Have you ever consumed alcohol? Yes No If yes, please describe:

Frequency: _____ Amount: _____ Date last used: _____

Have you ever used any form of tobacco (including pipe, cigar, chewing tobacco, vapes)? Yes No

If yes, please describe:

Type: _____ Frequency: _____ Amount: _____ Date last used: _____

Within the past 5 years, have you ever been convicted of a felony? Yes No If yes, please describe:

Within the past 5 years, have you had any accidents, moving violations, or your driver's license suspended or revoked? Yes No If yes, please describe:

Within the next 2 years, do you plan to fly, or within the last 2 years have you flown as a pilot, student pilot, or crew member? Yes No If yes, please describe:

Within the next 2 years, do you plan to participate in, or within the last 2 years have you participated in, parachute jumping, scuba diving, auto/motorboat/motorcycle racing, hang gliding, or mountain climbing?

Yes No If yes, please describe:

Within the next 2 years, do you plan or expect to travel or reside outside the USA? *Please consider "Yes" only if flights and housing have been secured.* Yes No If yes, please specify where, when, duration, business or pleasure, etc.: