				CLIENT D	ATA SHEET			Did you ask for referrals?		
INSURED										
	NA	ME		DA	DATE OF BIRTH			AGE		
		ADD	DRESS		PHO	PHONE NUMBER			DECISION MAKER?	
								Y / N		
			checking		direct express prepai		d card			
D/	BANKING		1st 3rd		WED Bi - W		eekly			
		FAC	FIND				SAVINGS	CHECKLIST		
SS	SSE	D SSI	Medicare	Medicaid	RX []	Dental []	Vision []	Hearing []	
Suppleme	ent			FS:Y / N	Life Ber	nefit				
UNDERWRITING						POLICY REVIEW				
Conditic	on	Date	Drill D	owns	(Com	pany	Policy #		
Tobacco		Y / N	Quiting?							
Heart Atta	ick		CHF*	Nitro	Effective Date		Draft Day			
A-Fib			Pacemaker	Defib						
Stroke					Face Amount		Premium			
Diabete	es		Insulin	Neuropathy						
Cance	er		Treatment wi	thin 2 years?*	Cash Vo	Cash Value Surrender Value		Future Premiums (Term)	Cost of Ins (UL)	
COPD			Oxygen*							
MS / Lup	ous				Loan Bala	ince	Interest Rate			
Liver/Kidn	iey		Dialysis*							
HIV* / HE	ΞP		Treated?	/ /	Redu	Reduced Paid Up				
Bi-Polar/Sch	nizo									
Memory	у*				Beneficiaries					
Hospitaliz	ed		How Long:							
MEDICATIONS & NOTES										

RED FLAGS	Diagnosis	Oxygen, Dialysis, Alzheimer's/dementia, HIV, Organ Transplant Congestive Heart Failure (CHF), Cancer (<2 yrs), Heart/Stroke/Circulatory (<12 months)		
	RX	Antabuse, Aricept, Azathioprine, CellCept, Cognex, Digoxin, Disulfiram, Donepezil Entresto, Exelon, Imuran, Memantine, Mycophenolate, Mofetil, Namenda, Namzaric, Prograf Rapamune, Rapamycin, Razadyne, Rivastigmine, Suboxone, Subutex, Tacrolimus, Zubsolv		

Client Name:			POLICY	REVIEW Is this their only policy with you?					
	Poli	су 1		Policy 2					
Company		Policy #		Company		Policy #			
	- Dala					Dud			
Effective Date		Draft Day		Effective Date		Draft Day			
Face A	mount	Premium		Face Amount		Premium			
Cash Value	Surrender Value	Future Premiums (Term)	Cost of Ins (UL)	Cash Value	Surrender Value	Future Premiums (Term)	Cost of Ins (UL)		
Loan Balance	Interest Rate			Loan Balance	Interest Rate				
Poducoc	d Paid Up			Paduca					
Reduced	י רטוט טף			Reduced	d Paid Up				
	Benefi	ciaries		Beneficiaries					
	NO	TES			NOTES				
	Poli	cv 3		Policy 4					
Com	pany	Policy #		Com	Company		Policy #		
Effective Date		Draft Day		Effective Date		Draft Day			
Face Amount		Dropoium		Face Amount		Premium			
FUCE A	Inouni	Premium		Face P	TUCE ATTOUTI		FIEITIIUTT		
Cash Value	Surrender Value	Future Premiums (Term)	Cost of Ins (UL)	Cash Value	Surrender Value	Future Premiums (Term)	Cost of Ins (UL)		
Loan Balance	Interest Rate			Loan Balance	Interest Rate				
Doducor	Daid Up			Deduce					
Reduced Paid Up				Reduced	d Paid Up				
	Benefi	ciaries		Beneficiaries					
	NO	TES		NOTES					
For Universal Life									
 Based on the planned premiums and guaranteed assumptions when will this policy lapse? Can you fax/email me the last annual report? Order Illustrations: Policy based on current premiums and guaranteed assumptions. Solve for: premium needed to guarantee policy to maturity 									