



## Life Insurance Questionnaire

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Client Name \_\_\_\_\_ DOB \_\_\_\_\_ Height \_\_\_\_\_ Weight \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State/Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Cell \_\_\_\_\_ Email \_\_\_\_\_

Are you a US Citizen? \_\_\_\_\_

Have you ever used any form of tobacco? \_\_\_\_\_  
If so, when \_\_\_\_\_ what \_\_\_\_\_

Date & reason of last doctor visit \_\_\_\_\_

**Current Medications** – list all taking along with the condition each prescribed for, length of time taken, frequency, and dosage.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

For the following questions, if “Yes”, please provide details below.

Have you ever been treated or diagnosed with any of the following:

- |  |  |  |                                 |
|--|--|--|---------------------------------|
| <input type="checkbox"/> Heart Disease | <input type="checkbox"/> Stroke              | <input type="checkbox"/> COPD          | <input type="checkbox"/> Cancer |
| <input type="checkbox"/> Diabetes      | <input type="checkbox"/> Lupus               | <input type="checkbox"/> MS            | <input type="checkbox"/> Asthma |
| <input type="checkbox"/> Sleep Apnea   | <input type="checkbox"/> Arthritis           | <input type="checkbox"/> Alcohol Abuse |                                 |
| <input type="checkbox"/> Drug Abuse    | <input type="checkbox"/> High Blood Pressure | <input type="checkbox"/> Depression    |                                 |

Do you do any foreign travel? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Do you participate in flying (airplanes, helicopters, hot air balloons, etc.), scuba diving, or racing? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Have you ever been rated or declined for insurance? Why? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Has any member of your family (parent or sibling) been treated for cancer, heart disease, or any cardiac related condition prior to age 60? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Please provide details to any questions above. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_