

Access Brokerage Services

Phone: 631-473-7244

Fax: 631-473-7592

Pre – Underwriting Information For: _____

Personal Medical History

1. What is client's actual birthday (most companies use age nearest birthday)? _____
2. If known, list the following health criteria:
Cholesterol Level: _____
Cholesterol Ratio: _____
Blood Pressure: _____
3. If client has ever used tobacco, indicate when last time it was used? _____
4. Indicate client's height & weight: _____
5. List any medical conditions that may effect client's insurability. Please provide as much detail as possible including onset/cure dates and any medications that are currently prescribed.

Family Medical History

Is there any family history of cancer, stroke or heart disease (mother, father, siblings)?
If so, please indicate age disease was onset and age of death if applicable.

Family Member	Health Condition	Age Onset	Age @ Death

Financial Qualifications

Is proposed insured employed? _____ Income: _____
Assets: _____ Liabilities: _____

Foreign Travel / Citizenship*

1. If client is not a us citizen:
 - a. Indicate how many years they have been a resident.
 - b. What ties do they have to the US (i.e. financial/business, family, etc)
 - c. List VISA type and/or Green Card status
2. Please list any foreign travel client has had in the past several years or any planned foreign travel in the future.

Driving History / Criminal Activity / Substance Abuse / Bankruptcy*

1. Does client have any moving violations or license revocations in the past 5 years?
2. Any DWIs, or DUIs in the past 10 years?
3. Has client ever been convicted of a misdemeanor or felony?
4. Any history of substance or alcohol abuse in the past 10 years?
5. Has proposed insured ever filed for bankruptcy? If so, please provide details.

Hazardous Activities*

If client is a pilot or participates in any hazardous activities such as scuba diving, skydiving, racing, etc, please complete the appropriate underwriting form for further consideration.

*May require additional forms to be submitted with application.