



## Cardiac Disease

*Please answer all questions applicable to the client's medical history.*

Producer Name \_\_\_\_\_ Phone \_\_\_\_\_ Date \_\_\_\_\_

Client Name \_\_\_\_\_ Date of Birth \_\_\_\_\_  Male  Female

Face Amount \_\_\_\_\_ Max Premium \$ \_\_\_\_\_ /yr.  Term  Permanent

Has the client ever used any form of tobacco (cigarettes, cigars, pipe, snuff, etc.)?  Yes  No

Frequency \_\_\_\_\_ Date of last use \_\_\_\_\_ Type \_\_\_\_\_

Has the client had a heart attack?  Yes  No  
If yes, provide date \_\_\_\_\_

Provide dates if any of the following tests have been completed

- Resting EKG \_\_\_\_\_
- Stress thallium \_\_\_\_\_
- Stress echo \_\_\_\_\_
- Other \_\_\_\_\_
- Stress test \_\_\_\_\_
- Echocardiogram \_\_\_\_\_
- EBCT (CT of the heart) \_\_\_\_\_

Provide dates and results of any surgical procedures

- Bypass (CABG) \_\_\_\_\_
- Angioplasty (PTCA) \_\_\_\_\_
- Coronary artery stents \_\_\_\_\_

How many vessels are involved  1  2  3 or more Which vessels \_\_\_\_\_

What conditions has the client been diagnosed with

- Diabetes Age of onset \_\_\_\_\_ Recent A1c result \_\_\_\_\_
- High blood pressure Most recent reading \_\_\_\_\_
- Irregular heartbeat
- Other arterial disease  Carotid  Peripheral Vascular  Cerebrovascular

Does the client take any current medications, including preventative aspirin  Yes  No

| Name of Medication (prescription or otherwise) | Dates Used | Quantity Taken | Frequency Taken |
|--|------------|----------------|-----------------|
|  |            |                |                 |
|  |            |                |                 |
|  |            |                |                 |

Does the client engage in any regular exercise or sporting activity  Yes  No If yes, provide details \_\_\_\_\_

List any other major health problems the client has: \_\_\_\_\_

### Questions?

**Call McGill Brokerage at (800)-279-0751 ext. 233 for Dan Dahl, 210 for Tim Simmons, and 228 for Gary Kay. Email questions or completed forms to [ddahl@mcgillbrokerage.com](mailto:ddahl@mcgillbrokerage.com), [tsimmons@mcgillbrokerage.com](mailto:tsimmons@mcgillbrokerage.com), and [gkay@mcgillbrokerage.com](mailto:gkay@mcgillbrokerage.com).**