

In-Home Cornerstone Concierge Field Underwriting worksheet

Carriers Contracted with/State your in: _____/_____

CLIENTS DATE OF BIRTH Name: _____ ____/____/____ MALE / FEMALE H/W: _____/_____	In the last 12 months has your client smoked YES / NO Cigarettes / Cigars / Chew / VAPE / E-CIG / Marijuana	Been on disability in the last 10yrs Yes / NO If so why/when:	Type of client: MP / Final Expense Looking for Term / Perm Working: YES / NO
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Every applied for life insurance before and been declined: yes / no

ALL medications they have been prescribed in the last 90days: along with dosage, when first prescribed and why are they prescribed it.

ANY Blood thinners or water pills in last 10yrs: yes / no (if so why)

ANY YES ANSWER PLEASE RESPONDED WITH: WHEN DIAGNOSED, HOW BEING TREATED, EVER HOSPITALIZED BECAUSE OF IT, EVER TAKEN TIME OFF OF WORK BECAUSE OF IT, IS IT NOW UNDER CONTROL, has treatment changed at all, any surgeries

HAS YOUR CLIENT EVER:

CONDITION (circle what apply)	DETAILS
1. Any Mental Related conditions: (SUCH AS Depression, PTSD, Anxiety, schizophrenia, Alzheimer's, dementia)	
2. ANY heart related conditions: (such as blood pressure, heart attack, angina, Congestive heart failure, heart surgery, chest pain, stents, heart valve issues, pacemaker, A-Fib, anything?)	
3. Any Respiratory conditions: (such as, asthma, copd, chronic bronchitis, every prescribed an inhaler, ever prescribed oxygen, shortness of breath)	
4 any conditions with : kidneys, liver, blood, auto-immune, stroke, Parkinson's, crohns, hepatitis, fibromyalgia, sleep apnea, seizures epilepsy,	
Ever any cancer? Date of last treatment: ____/____ Stage: 1 / 2 / 3 / 4 Every reoccurrence: yes / no	Still on any hormone replacement or cancer preventable meds? Yes / no
Ever Diabetes? Recent A1c: _____ Any complications or neuropathy: yes / no	Ever Insulin: yes / no
Any surgery or pain meds in last 10yrs:	
Prescribed anything else in the last 10yrs? Been to the hospital for any reason in last 10yrs	
DUI or license suspension in last 10yrs, 2 or more moving violations? Any felonies or misdemeanors	