

**QUICK QUOTE**

Systemic Lupus Erthematosus

(SLE)

**Nashville  
Brokerage**

*"Saving You Time, Making You Money"*

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**JIM BECK**

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Client Name \_\_\_\_\_ Sex \_\_\_\_\_ DOB \_\_\_\_\_ AGE \_\_\_\_\_ HT \_\_\_\_\_ WT \_\_\_\_\_ State \_\_\_\_\_

Amt. requested\$ \_\_\_\_\_ Annual Premium\$ \_\_\_\_\_ Type of Insurance UL \_\_\_\_\_ Term \_\_\_\_\_

Tobacco use No \_\_\_\_\_ Yes \_\_\_\_\_ Type \_\_\_\_\_ Amt of Insurance in force \_\_\_\_\_ Replacement \_\_\_\_\_

Occupation \_\_\_\_\_ Marital Status Single Married Divorced Widowed

Family History- Age if still living: Father \_\_\_\_\_ Mother \_\_\_\_\_ Brothers \_\_\_\_\_ Sisters \_\_\_\_\_

Any deceased? If so give relation, age and cause of death of each \_\_\_\_\_

Do you exercise regularly? Yes \_\_\_\_\_ No \_\_\_\_\_ Details \_\_\_\_\_

Date of last medical checkup \_\_\_\_\_ Date of last EKG \_\_\_\_\_ Results of EKGs \_\_\_\_\_

Are you treated for Hypertension? Yes \_\_\_\_\_ No \_\_\_\_\_ Last Blood Pressure Reading \_\_\_\_\_/\_\_\_\_\_

Are you treated for Cholesterol? Yes \_\_\_\_\_ No \_\_\_\_\_ Last Cholesterol HDL Readings \_\_\_\_\_/\_\_\_\_\_

Agent: Name \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

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

1 List date of diagnosis \_\_\_\_\_

5 Has the client had any of the following? Circle any that apply.

2 Please circle the type of Lupus diagnosed.

Low Blood Counts

A Systemic Lupus Erthematosus (SLE)

Lung involvement

B Discoid Lupus

Proteinuria

C Drug Induced Lupus

Neurological disorders

3 Is the Client taking any medications for this impairment? Please List.  
\_\_\_\_\_  
\_\_\_\_\_

Heart involvement

Renal Insufficiency.

4 Is the Lupus in remission?  
\_\_\_\_\_  
\_\_\_\_\_

6 List any other illnesses or impairments?  
\_\_\_\_\_  
\_\_\_\_\_