



# Disability Income Fact Finder

Agent \_\_\_\_\_ Email \_\_\_\_\_ Phone \_\_\_\_\_

Client \_\_\_\_\_ DOB \_\_\_\_\_ Male \_\_\_ Female \_\_\_ State \_\_\_\_\_

## MEDICAL HISTORY

Do you use tobacco in any form? Yes \_\_\_\_\_ No \_\_\_\_\_

Build Height \_\_\_\_\_ Weight \_\_\_\_\_

Are you currently taking any medication(s)? Yes \_\_\_\_\_ No \_\_\_\_\_

Are you pregnant? Yes \_\_\_\_\_ No \_\_\_\_\_

**Do you have a history of:**

Neck or back disorder? Yes \_\_\_\_\_ No \_\_\_\_\_

Mental / Nervous conditions? Yes \_\_\_\_\_ No \_\_\_\_\_

Diabetes? Yes \_\_\_\_\_ No \_\_\_\_\_

**In the past 5 years have you seen any:**

Physicians? Yes \_\_\_\_\_ No \_\_\_\_\_

Chiropractors? Yes \_\_\_\_\_ No \_\_\_\_\_

Counselors/Psychiatrists? Yes \_\_\_\_\_ No \_\_\_\_\_

**Please list any medications, details to any "Yes" answers and any other medical history:**

## OCCUPATION

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Please list your occupation and duties:

Are you Self-Employed? Yes \_\_\_\_\_ No \_\_\_\_\_

Are you a C-Corp, S-Corp, LLC, Sole Proprietor? Yes \_\_\_\_\_ No \_\_\_\_\_

Are you a Federal, State, or City Employee? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you work from home? Yes \_\_\_\_\_ No \_\_\_\_\_

## FINANCIAL

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Salary \$ \_\_\_\_\_

### Gross earnings after expenses (if self-employed)

Current Year to date Yes \_\_\_\_\_ No \_\_\_\_\_

Last Year Yes \_\_\_\_\_ No \_\_\_\_\_

2 Years Ago Yes \_\_\_\_\_ No \_\_\_\_\_

Do you have annual unearned income (e.g. dividends, interest) that exceeds 10% of earned income or does your net worth exceed \$3,000,000? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you receive any bonuses or pension distributions not included in the Gross Earnings above? Yes \_\_\_\_\_ No \_\_\_\_\_

Annual Retirements Plan Contribution Yes \_\_\_\_\_ No \_\_\_\_\_

Company Match? Yes \_\_\_\_\_ No \_\_\_\_\_

Are you a permanent resident/citizen of the United States? Yes \_\_\_\_\_ No \_\_\_\_\_

## LIST CURRENT DISABILITY INCOME INSURANCE

Company	Type of Coverage (Group, Individual, Overhead Expense)	Benefit Amount or % of Income	Elimination Period	Benefit Period	Individual Pay	Employer Pay