

**INE** | INSTITUTE OF  
NUTRITIONAL  
ENDOCRINOLOGY

**History Taking:  
Demographics and Goals**

**Dr. Ritamarie Loscalzo**

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**Medical Disclaimer:** The information in this presentation is not intended to replace a one-on-one relationship with a qualified health care professional and is not intended as medical advice. It is intended as a sharing of knowledge and information from the research and experience of Dr. Ritamarie Loscalzo, drritamarie.com, and the experts who have contributed. We encourage you to make your own health care decisions based upon your research and in partnership with a qualified health care professional.

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**Components of a Thorough History  
Demographics and General Information**

- ✓ Name, address, phone number
- ✓ Height and weight
- ✓ Marital status and family members
- ✓ Occupation
- ✓ Education
- ✓ Travel
- ✓ Pets



**Demographics and General Health Form**

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**Components of a Thorough History**  
**Health Goals**

- ✓ Palliative, Preventative, or Seeking Optimal Health and Functioning
- ✓ 5-Year Vision
- ✓ 1-Year Vision
- ✓ 90-Day Goal
- ✓ 1-Month Goal



**Health Values, Visions, and Goals Form**

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