



## INDIVIDUAL FINANCIAL STATEMENT

Washington Driver's Lic. No: \_\_\_\_\_ Washington Driver's Lic. No: \_\_\_\_\_  
 Name(s) \_\_\_\_\_ Home Phone \_\_\_\_\_ Business Phone \_\_\_\_\_  
 Address \_\_\_\_\_  
 Social Security No. \_\_\_\_\_ Date of Birth \_\_\_\_\_ No. of Dependents \_\_\_\_\_  
 Occupation \_\_\_\_\_ Employer \_\_\_\_\_

CHECK AS APPLICABLE – Type of Account:  Individual  Joint \_\_\_\_\_ Initial here to confirm intent to make joint application

1. Marital Status:  Married  Separated  Unmarried (Including single, divorced, and widowed) Name of Spouse \_\_\_\_\_
- \*2. Are you relying on alimony, child support, or separate maintenance payments as a basis for the repayment of the credit requested?  
 Yes  No Name \_\_\_\_\_
2. Are you relying on income or assets of another person as a basis for repayment of the credit requested?  Yes  No Name \_\_\_\_\_
3. Has any of your property been transferred to a trust?  Yes  No Is it  revocable or  irrevocable? Who is/are the trustee(s): \_\_\_\_\_

Are any of the assets listed on this statement property of a trust?  Yes  No If so, attach a sheet listing those assets.

### FINANCIAL CONDITION AS OF \_\_\_\_\_, 20\_\_\_\_

ASSETS			LIABILITIES		TOTAL LIABILITY	Monthly Payment
Cash	In This Institution		Notes Payable to Banks (non real estate)	<b>SCHEDULE E</b>		
	Other Banks			Payable to This Institution		
Stocks & Bonds	<b>SCHEDULE B</b>		Other Notes & Accounts Payable	<b>SCHEDULE E</b>		
	Listed			Contract Purchases		
Notes, Contracts & Accounts Receivable	<b>SCHEDULE C</b>		Taxes Payable	Open & Revolving Accounts		
				Other		
Life Ins.	Cash Value		Real Estate Notes & Contracts Payable	<b>SCHEDULE D</b>		
Real Estate	<b>SCHEDULE A</b>			Residences(s)		
	Residence(s)		Unimproved Land			
	Unimproved Land		Income Property			
	Income Property		Other			
Other Personal Property	<b>SCHEDULE F</b>		Other Liabilities	<b>SCHEDULE E</b>		
	Autos & Trucks			Life Ins. Loans		
Other Assets	<b>SCHEDULE F</b>	Retirement Accounts				
<b>TOTAL ASSETS</b>			<b>TOTAL LIABILITIES</b>			
			<b>NET WORTH</b>			
			<b>TOTAL</b>			

#### RE-CAP OF INCOME AND EXPENSES

ANNUAL INCOME FOR YEAR 20		ANNUAL EXPENSES FOR YEAR 20		CONTINGENT LIABILITIES	
Salary or Wages		Property Tax & Assessments		As Endorser on Notes/Contracts	
Dividends or Interest		Fed. & State Income Tax		As Guarantor on Notes/Contracts	
Rentals (Gross Income)		Real Estate Loan Payments		For Taxes	
Business (Net Income)		Payments on Contracts/Notes		Other (Describe)	
Other Income (Describe)*		Estimated Living Expenses			

		Other:			
TOTAL INCOME	\$	TOTAL EXPENSES	\$	TOTAL	\$

\*Alimony, child support or separate maintenance payment income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.

**LIFE INSURANCE**

FACE AMOUNT	CASH VALUE	BENEFICIARY	COMPANY

**APPLICANTS SIGNATURE(S)**

I/we hereby affirm that the information contained in this financial statement is presented for the purpose of obtaining credit as of the date indicated and is true, complete and correct. I/we understand The Bank of Washington is relying on this statement of my/our financial condition in making loan(s) to me/us. The Bank of Washington is authorized to make any investigation of my/our credit or employment status either directly or through any agency employed by The Bank of Washington for that purpose. I/we agree to inform The Bank of Washington immediately of any matter that will cause any significant change in my/our financial condition. I/we understand that The Bank of Washington will retain this financial statement whether or not credit is granted.

Date \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_ Signature \_\_\_\_\_

**CONSENT (If you are relying on income from a person who is not an applicant above, please have that person complete this section so that we may verify their credit.)** The Bank of Washington may be relying on: 1) income from an individual who is not an applicant for the consumer loan, or (2) an individual co-borrower, owner, partner, officer or guarantor, for the business loan. Because of your relationship to the loan applicant or your role in the accommodation for the loan, your personal creditworthiness is a factor in the evaluation of the application or accommodation for the loan. By signing below, I authorize the financial institution to obtain a consumer credit report on me for that purpose to evaluate the loan application.

Date \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_ Signature \_\_\_\_\_

**(SHORT FORM – COMMUNITY PROPERTY STATES)  
(TUMBLE)**

With each schedule list below indicate co-ownership, if any, and the extent of it.

<b>SCHEDULE A LIST OF REAL ESTATE AND IMPROVEMENTS (Show Mortgage Information in Schedule D)</b>								
Type and Location of Property	Date Acquired	Title in Name of	Holder of Lien	% You Own	Annual Taxes	Monthly Rental Income	Original Cost	Present Market Value
1								
2								
3								
4								
5								
6								
7								
<b>TOTAL</b>								

<b>SCHEDULE B STOCKS AND BONDS</b>				
Number of Shares	Description – Rate – Maturity If Pledged, to Whom	How Registered	Market Value	Book Value If No Market
<b>TOTAL</b>				

<b>SCHEDULE C NOTES, CONTRACTS AND ACCOUNTS RECEIVABLE</b>						
Due from (Name)	Date of Obligation	Balance		Monthly Payment	Due Date	Description of Collateral If Any
		Original	Present			

<b>TOTAL</b>						

**SCHEDULE D REAL ESTATE MORTGAGES PAYABLE**

	Due to (Name)	Date of Obligation	Balance		Monthly Payment	Due Date	Description of Collateral If Any
			Original	Present			
1							
2							
3							
4							
5							
6							
7							
8	<b>TOTAL</b>						

**SCHEDULE E NOTES, CONTRACTS AND ACCOUNTS PAYABLE (Include auto loan and other term debt)**

	Due to (Name)	Date of Obligation	Balance		Monthly Payment	Due Date	Description of Collateral If Any
			Original	Present			
	<b>TOTAL</b>						

**SCHEDULE F DETAILS OF OTHER IMPORTANT ASSETS**

Automobiles	Estimated Current Value	Other Items	Estimated Current Value	Other Items	Estimated Current Value
<b>TOTAL</b>					