WASHINGTON TRUST®

Securities Based Loan Application

CLIENT INFORMATION

Borrower:			**Co-Borrower:**		
Address			**Address**		
Phone Number	**Social Security No./ EIN**	**Date of Birth**	**Phone Number**	**Social Security No. / EIN**	**Date of Birth**
Trustee / Pledgor (if assets are held in a Trust)			**Trustee / Pledgor (if assets are held in a Trust)**		
Successor Trustee(s) (if applicable and if assets are held in a Trust)			**Successor Trustee(s) (if applicable and if assets are held in a Trust)**		
Beneficiaries (if applicable and if assets are held in a Trust)			**Beneficiaries (if applicable and if assets are held in a Trust)**		
Name & Phone No. of your Accountant			**Name & Phone No. of your Investment Advisor**		
Name & Phone No. of your Estate Attorney			**Name & Phone No. of your Insurance Advisor**		

BALANCE SHEET

ASSETS	AMOUNT ($)	LIABILITIES/NEW WORTH	AMOUNT ($)
Cash in this Bank (incl. money market accounts, CDs)	$0	Notes Payable to this Bank	
Cash in Other Financial Institutions (list):		Secured	$0
	$0	Unsecured	$0
	$0	Notes Payable to Others (Schedule E)	
	$0	Secured	$0
	$0	Unsecured	$0
Readily Marketable Securities (Schedule A)	$0	Accounts Payable (including credit cards)	$0
Non-Readily Marketable Securities (Schedule A)	$0	Margin Accounts	$0
Accounts and Notes Receivable	$0	Notes Due: Partnership (Schedule D)	$0
Cash Surrender Value of Life Insurance (Schedule B)	$0	Taxes Payable	$0
Residential Real Estate (Schedule C)	$0	Mortgage Debt (Schedule C)	$0
Real Estate Investments (Schedule C)	$0	Life Insurance Loans (Schedule B)	$0
Partnerships/PC Interests (Schedule D)	$0	Other Liabilities (list):	$0
IRA, Keogh, Profit-Sharing & Other Vested Ret. Acc.	$0		$0
Deferred Income (Number of years deferred) 0 years	$0		$0
Personal Property (including automobiles)	$0		$0
Other Assets (list):	$0		$0
	$0	**TOTAL LIABILITIES**	$0
	$0	**TOTAL NET WORTH**	$0
TOTAL ASSETS	$0	**TOTAL LIABILITIES AND NET WORTH**	$0

QUESTIONS	YES	NO	AMOUNT ($)
1. Have (either of) you or any firm in which you were a major owner ever declared bankruptcy? If yes, please provide details under separate cover.	○	⊙	N/A
2. Are any tax returns currently being audited or contested?	○	⊙	N/A
3. Are any of your tax obligations past due? If so, please indicate the total amount due.	○	⊙	$0
4. Are you aparty to, or are there any suits or legal actions pending against you? If so, please provide the amount related to the legal action.	○	⊙	$0
5. Are you a guarantor, co-maker, or endorser for any debt of an individual, corporation, or partnership? If so, please provide the associated amount.	○	⊙	$0
6. Do you anticipate any substantial inheritances? If so, please provide an estimated amount and/or explain:			
7. Please list any dependents related to the applicant (exlcuding self):			

The information contained in this statement is provided to induce you to extend or to continue the extension of credit to the undersigned a related entity or to others upon the guarantee of the undersigned. The undersigned, as indicated by a written or electronic signature below, acknowledges and understands that you are relying on the information provided herein in deciding to grant or continue credit or to accept a guarantee thereof. Each of the undersigned represents, warrants and certifies that the information provided herein is true, correct and complete. Each of the undersigned agrees to notify you immediately and in writing of any change in name, address, or employment and of any material adverse change (1) in any of the information contained in this statement or (2) in the financial condition of any of the undersigned or (3) in the ability of any of the undersigned to perform its (or their) obligations to you. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement. You are authorized to make all inquiries you deem necessary to verify the accuracy of the information contained herein and to determine the creditworthiness of the undersigned. The undersigned authorize any person or consumer reporting agency to give you any information it may have on the undersigned. Each of the undersigned authorizes you to answer questions about your credit experience with the undersigned. This document and any other financial or other information that the undersigned give you shall be your property. With submittal of this document you are acknowledging that you are responsible for the fees which are incurred with the submittal of this application, including but not limited to any documentation, legal or trust review fees. Your written or electronic signature below shall be considered valid and correct.

Date _____ Borrower / Trustee Signature _____

Date _____ Co-Borrower / Co-Trustee Signature _____

SUBMIT APPLICATION TO:

Washington Trust c/o Private Clients Group
10 Weybosset Street, Suite 200
Providence, RI 02903
PrivateClientsGroup@washtrust.com

ATTACHMENTS:

1.Federal Tax Return(s) with all schedules & K-1s
2.Statement of Securities to be pledged by asset class
3.Certified copies of Trust agreement with all amendments
4.Enclosed check for the Documentation Fee

PRIOR TO CLOSING:

1.Opinion Letter evidencing the Trust's ability to borrow
2.Form of I.D. for each signer (i.e. copy of license)
3.Memorandum of Trust prepared by counsel
4.WTC Deposit Account# Information

**If you have not yet received one, please feel free to request a PORTAL link to securely send any sensitive financial information.*
*** A Washington Trust deposit account is requred for automatic loan payments and any disbursements of loan advances.*