



Westwater Financial, Inc.
55A Saint James Drive
Santa Rosa, CA 95403
707-419-3070

CLIENT INTAKE FORM

1. Name _____
2. Education level you completed. (Choose Highest) High School / GED Trade School AA/AS
 BA/BS Masters Post-Graduate
3. Current marital status: (Choose One) Married Single Widow Divorced
 Legally Separated
4. Number of individuals in your household? 1 2 3 4 5 6 7 8 9 10
or more _____
5. Number of dependents claimed on your taxes: 0 1 2 3 4 5 6 or more _____
6. Yearly household income: \$ _____
7. Are you a Veteran? Yes No. Do you receive any VA benefits? What? _____
8. Do you receive any Financial Assistance: No Yes (TANF, Food Stamps, SNAP, etc.) what type
of assistance do you receive? _____
9. How did you hear about the Westwater? Radio Newspaper Friend
 Postcard Flyer Tribe
10. Date of Birth? _____
11. Do you have a checking or savings account? Yes No
12. Have you ever had a loan? Yes No
13. Your Gender: Female Male Intersex Other _____

The information you provide is confidential and is used anonymously for funding purposes and to better serve our clients. The following information is requested by the Federal Government for certain types of loans, in order to monitor the lender's compliance with equal credit opportunity. You are not required to furnish this information, but are encouraged to do so. A lender may neither discriminate on the basis of this information nor on whether you choose to furnish it. However, if you choose not to furnish it, under Federal regulations, this lender is required to note race/ethnicity on the basis of visual observation or surname. If you do not wish to furnish the above information, please check the box below.

I do not wish to furnish this information

Race: Caucasian Hispanic/Latino African American Asian
 Native Hawaiian/Other Pacific Islander Native American/Alaska Native Other _____

Are you a Tribal Elder? Yes No