

COMPANY SUPERVISION DIVISION
Annual Statement for
Life Settlement Providers – General Instructions
For the year ending December 31, 2025

To be in compliance with RCW 48.102.046(1) Washington State requires all licensed Life Settlement Providers (LSP) to file an Annual Statement, required supplements, and exhibits for the previous calendar year. Failure to complete this Annual Statement as prescribed will subject the LSP to possible disciplinary action.

Please contact the Company Supervision division at (360) 725-7200 or CompanySupervisionFilings@oic.wa.gov if you have any questions regarding the Annual Statement or its Instructions.

- The Annual Statement is an on-line form.
- All required attachments must be uploaded as PDF files.
- Incomplete or inaccurate submissions will be considered late.
- Failure to file by the due date can result in possible disciplinary action.
- All required documents must be uploaded before the online filing system will allow you to finalize your Annual Statement filing.

NOTE: If you have not filled out the Annual Statement completely and want to save your work to return to it later, click on the “Save” button at the bottom of the page. You may then Logout and return to your partially completed Annual Statement at a later time.

DOCUMENTS NEEDED TO MEET MARCH 1, 2026 REPORTING REQUIREMENTS

- 2025 Internal Financial Statement specific to the LSP as a separate legal entity.
- The Annual Statement Attestation- it must be signed and notarized to be accepted.
- Form: List of Washington Life Insurance Policies Purchased during 2025.
- Form: Washington Life Insurance Policies if payment was received in 2025.
- Antifraud Plan if it has changed since it was last filed with our office.
- Biographical Affidavits for new officers, directors, investors, partners, or members.
- Examination Statement from any State Dept. of Insurance or other regulatory body that was issued since the last Annual Statement filing.
- Form: Service of Process if the designee has changed.

DOCUMENTS NEEDED TO MEET JUNE 1, 2026 REPORTING REQUIREMENTS

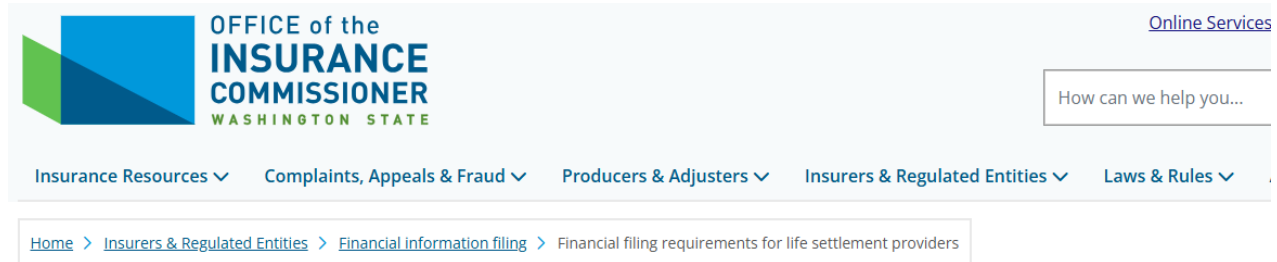
- 2025 Audited Financial Statement

Statement must be uploaded on the portal using:
Add Documents to Submitted Filing Tab

FORMS AND FILING INFORMATION

Blank forms are on our website:

<https://www.insurance.wa.gov/insurers-regulated-entities/financial-information-filing/financial-filing-requirements-life-settlement-providers>



The screenshot shows the top navigation area of the Washington State Insurance Commissioner website. On the left is the logo for the Office of the Insurance Commissioner, Washington State. To the right is a search bar with the text "How can we help you...". Below the logo and search bar are several navigation menus: "Insurance Resources", "Complaints, Appeals & Fraud", "Producers & Adjusters", "Insurers & Regulated Entities", and "Laws & Rules". At the bottom of the screenshot is a breadcrumb trail: "Home > Insurers & Regulated Entities > Financial information filing > Financial filing requirements for life settlement providers".

Financial filing requirements for life settlement providers

The annual forms and instructions are located under the heading for **Financial statement filing instructions** including:

- Annual Statement Attestation
- List of Washington life insurance policies purchased
- List of Washington life insurance policies for which the Life Settlement Provider received payment
- Accessing the portal
- Portal menu options
- Guidance for completing each page of the annual statement

You can also access the Annual Statement online form for 2025 here by clicking on:

[File your annual statement for life settlement providers](#)

Other forms can be found at:

<https://www.insurance.wa.gov/insurers-regulated-entities/company-registration-and-renewal/company-registration-and-renewal-life-settlement-providers>

- Biographical Affidavit
- Service of legal process form
- Anti-fraud plan

PAYMENTS FOR FILING AND RENEWAL FEES

Please review:

- RCW 48.102.010 regarding the registration renewal fee requirements.

The person listed as your Annual Statement filing contact will receive an e-mail in January when your fees are available to be paid.

- You may pay by credit card, electronic funds transfer, or by check.

Please note that this information replaces and supersedes all previous filing instructions and exemptions that you may have received from this office. If you have questions regarding the filing information, instructions, or requirements, please contact us at (360)725-7200 or email CompanySupervisionFilings@oic.wa.gov prior to any deadline.