



APPLICATION FOR PARTICIPANT LOAN

To be completed by the PARTICIPANT

Plan Name

Co-Employer Client ID / Div

Participant Name SSN

Date of Birth Date of Hire

Marital Status: Married Single Divorced/Separated

I hereby apply for a loan from the Plan. In support of this loan application, I attach such information that the Plan Administrator may require to determine whether I qualify for the loan, which may include financial statements and tax returns. I also authorize the Plan Administrator to secure any credit reports to determine my creditworthiness and ability to repay the loan.

In applying for this loan, I acknowledge that I have read the section of the Summary Plan Description governing Plan loans and have been furnished with a copy of the Participant Loan Program established by the Plan.

The amount of the loan request is _____ for a period of _____ months (if longer than 60 months, the purpose of the loan must be to acquire your principal residence).

I understand the Plan Administrator will make any loan in reliance on the statements on this APPLICATION FOR PARTICIPANT LOAN which I certify are correct and complete. If any statement proves false, then the Plan may declare my indebtedness immediately due.

I hereby authorize the Plan Administrator to verify the statements in this application and to obtain any information the Plan or its authorized representative may require in connection with this application.

EXECUTED this _____ day of _____, 20_____.

Signature of Loan Applicant

Please provide this Loan Application to the Plan Administrator at your company for approval..

To be completed by the PLAN ADMINISTRATOR

Payroll Frequency: Weekly Semi-Monthly Bi-Weekly Monthly

Last pay date: Pay Day: Monday Tuesday Wednesday Thursday Friday

Hours worked during current Plan Year: _____ How many prior Plan Years did the participant work less than 1,000 hours? _____

Fax completed Loan Application to (515) 226-9414 for compliance review and the preparation of the Participant Loan Package.

Signature of Authorized Plan Representative

The Plan Administrator will receive the Loan Package within 3-5 business days. The participant can expect their loan proceeds within 14 business days following the completion of the Loan Package.