## PLAN NAME: Loan Application Form

Please Print. Complete all applicable areas				
Part I. Employee Information:				
Name:	Social Security #			
Address:	Date of Birth://			
City:	State: ZIP Code:			
Marital Status:   Married  Single	US Citizen/Resident Alien: 🔲 Yes 🔲 No			
Account or Plan Number				
Part II. Type of Loan				
General Purpose Loan for \$				
Part III. Terms: I hereby request a Loan with the	following term.			
Maximum Repayment Period: Years. o	r Months.			
Repayment Frequency: Scheduled installment				
<b>Part IV. Modification:</b> Refinance my existing Gene repayment deadline is 5 years from original loan date				
Modify Repayment Amount				
<b>Part V. Loan Request:</b> I hereby apply for a loan fror PROFIT SHARING PLAN. I acknowledge that my loa Loan Policy and confirm that I understand the terms of scheduled installments.	an will be subject to the terms and conditions of the			
Applicant's Signature	// Date			
Part VI. Loan or Plan Administrator's Approval: I certify that all Participant and distribution informatior	n is accurate			
□Participant Loan approved. □Participant Loa				
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Administrator Signature

\_\_'\_\_/\_\_\_ Date

## Part I. Employee Information:

Nam	ne:	Social Security	#		
Add	ress:	Date of Birth:	//		
City:	:	State:	ZIP Code:		
	Loan Calculator				
A.	Statutory Loan Maximum		\$		
	Highest Outstanding Loan Balance \$ during the past 12 months				
C.	Current Loan Balance \$	·			
D.	Enter the Difference between B and C (Subtract C from B)	)	\$		
E.	Reduced Statutory Limit – Subtract D from A		\$		
	Vested Account Balance on// (* Note: The amount entered should include the Current C Balance)	utstanding Loan	\$*		
G.	50% of Vested Account Balance		Multiply by 50%		
Н.	Adjusted Vested Account Balance		\$		
١.	Amount Available for a Loan - Enter Lesser of E or H		\$		
J.	Current Outstanding Loan Balance		\$		
K.	Adjusted Amount Available for a NEW Loan (Subtract J fro	om I)	\$		

Type of Loan: 
General 
Residence 
Modify Schedule Installments 
Refinancing

Amount of Loan Approved:	\$
Interest Rate:	%
Loan Date:	//
Maturity Date:	//
Scheduled Installment: (principal + interest)	\$
Repayment Method: □Payroll Deduction □Self Pay* (*personal check, cashier's check, etc)	
Frequency: □Payroll Period □Weekly □bi-Weekly □Monthly □bi-Monthly □Quarterly	

Loan Administrator