Loan Application for

Step 1: The Participant must confirm preprinted information and complete missing information.

Participant Name: _____ ☐ Married ☐ Single/Divorced

Social Security #: _____

Address: _____

City State, Zip: _____

Reason for Loan Request: _____

Amount Requested: ☐ _____ OR ☐ 100% of what's available
Specific Amount

Term of Loan: ☐ 1yr ☐ 2 yrs ☐ 3 yrs ☐ 4 yrs ☐ 5 yrs

☐ Check payable to The Pension Specialists, Ltd.enclosed for the $125 loan processing fee
☐ Deduct the $125 loan processing fee from my account

I understand that there is an annual loan maintenance fee of $75 that will either be deducted from my account or billed as applicable. I further understand that I am not guaranteed a loan of any said amount from the above plan.

Participant Signature_____ Date: _____

Step 2: The Employer must complete the following information.
Payroll Frequency: ☐Weekly ☐Bi-wkly ☐Semi-monthly ☐Monthly ☐Qtly

Next Payroll Check Date _____

Please send the Loan paperwork to me via ☐Mail ☐E-Mail ☐Fax (call before faxing)

Trustee Signature_____ Date: _____

Step 3: Fax this completed form to The Pension Specialists (TPS) at 815-399-9324. Upon receipt of this form TPS will confirm the amount available and will generate the Loan Documents to be forwarded to the Trustee within 48 hours.

Step 4: The Trustee will review the Loan Documents with the Participant and get applicable signatures. The Loan Documents can either be faxed to TPS at 815-399-9324 or mailed to TPS at PO Box 4247, Rockford IL 61110-0747.

Step 5: The Loan proceeds will be requested from the Investment Company only **after** TPS has received the executed Loan Documents.

For Administrative Use Only:
Loan Request: ☐Approved for $ _____ ☐Denied

Date App Received: _____ Date Loan Docs Mailed: _____ Date Loan Check Requested: _____