

Loan Application for Nationwide® Plans

Plan Name: _____

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: _____

Loan Amount Requested: \$ _____ Specific Amount OR 100% of what's available

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

I understand a \$125 loan processing fee will be deducted from my account and this will be in addition to the Loan Amount Requested. I understand that there is an annual loan maintenance fee of \$75 that will be deducted from my account in monthly increments.

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 Qlty

Next Payroll Check Date _____

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

Plan Sponsor Representative _____ 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:	<input type="checkbox"/> Approved for \$ _____	<input type="checkbox"/> Denied
Date App Received: _____	Date Loan Docs Mailed: _____	Date Loan Check Requested: _____