

**Participant Loan Request**

Company Name

Plan ID

**A. Employee Information**

First Name

MI

Last Name

SSN

Street Address

City

State

ZIP

Date of Birth

Phone Number

Email Address

**B. Loan Information**

Amount Requested: \$ \_\_\_\_\_ (Minimum loan amount is \$1,000. Maximum loan amount is the lesser of 50% of your vested account balance or \$50,000).

Loan Term (select one):

- One year     Two years     Three years     Four years     Five years  
 Six years\*     Seven years\*     Eight years\*     Nine years\*     Ten years\*

\*If you request a repayment term in excess of five years, the loan must be used to acquire a principal residence.

Payment Frequency (must be the same as your payroll frequency):

- Weekly     Bi-Weekly     Semi-monthly     Monthly

The Interest Rate for a loan with a repayment schedule of up to five years is two points above prime.

The Interest Rate for a residential loan with a repayment schedule of ten years is the conforming fixed ten-year rate found under mortgages at [www.usbank.com](http://www.usbank.com).

**C. Loan Processing Fee**

Pension Inc. assesses a service charge for loan processing. Please indicate how you wish to pay this fee:

- Deduct the Pension Inc. processing fee from my account.  
 Enclosed is a cashier's check or money order payable to Pension Inc. (Please contact Pension Inc. for fee amount.)

Your Recordkeeper/custodian may assess additional processing/maintenance fees. For more information, please contact your Plan Administrator.

**D. Signature**

I understand that by signing this loan request form the loan proceeds will be withdrawn from my account. I agree to repay the loan based on the repayment terms selected above and understand the loan is due and payable upon termination of employment.

Please refer to the Plan Loan Policy included with your Summary Plan Description for all terms and conditions.

X   
Signature of Participant

/ /   
Date (mm/dd/yyyy)

X   
Signature of Plan Administrator

/ /   
Date (mm/dd/yyyy)