

Loan Application Reference Form



Instructions: Complete Section 1 and submit to Plan Administrator along with the Loan Request Form.

1 Personal Information

Plan Name _____

Participant Name _____

Participant Social Security Number _____

Participant Phone Number _____

2 Repayment Schedule

Length of Loan *(if longer than 5 years, the purpose of the loan must be to acquire your principal residence)*

1 Year 2 Years 3 Years 4 Years 5 Years Other: _____

Employee Pay Cycle:

Monthly

(12 Pay Periods Per Year)

Twice Per Month

(24 Pay Periods Per Year)

Every Two Weeks

(26 Pay Periods Per Year)

Weekly

(52 Pay Periods Per Year)

Next Pay Date: _____

Interest Rate: Typically Prime + 1%. Please refer to Loan Policy.

Participant Signature _____

Date _____

Please print name _____