

# RETIREMENT PLAN LOAN REQUEST FORM

**YOUR EMPLOYER:** \_\_\_\_\_

**YOUR NAME:** \_\_\_\_\_  
Last First M.I.

**ADDRESS:** \_\_\_\_\_  
Street City State Zip Code

**SOCIAL SECURITY #:** \_\_\_\_\_ **BIRTH DATE:** \_\_\_\_\_ **PHONE #:** \_\_\_\_\_

**EMAIL ADDRESS:** \_\_\_\_\_

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## LOAN INFORMATION:

Amount of Loan: \$ \_\_\_\_\_ (you may write "maximum")  
The maximum is 50% of your vested balance up to \$50,000.

Number of Years: \_\_\_\_\_ (If over 5 years you must provide proof of purchase of primary residence)

Interest Rate: 1% above Prime Rate (Interest is paid to your account. Loan interest is not tax-deductible.)

Payroll Cycle:  weekly  bi-weekly  twice a month  monthly

**Notes:**

- A promissory note and amortization schedule will be mailed to your human resources department.
- Some plans require spousal consent
- Your check will be mailed to your human resources department to ensure the promissory note is signed before you receive the check.
- Funds will be sold pro-rata, source of money by hierarchy (rollover, deferral, match, other)
- Loan payments are made only through payroll deduction on an after-tax basis.
- Any applicable loan fees will be subtracted from your loan check, between \$100 to \$200 depending on the length of the loan.

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## OPTIONAL DELIVERY INFORMATION:

Optional Services (\$25.00):  Overnight check to my company's human resources department (see above)

The optional services will only save time as compared to US Mail and will not speed the processing of your loan. The \$20 fee will be deducted from your check.

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## SIGNATURES:

\_\_\_\_\_  
**Participant Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Trustee/Authorized Signature**

\_\_\_\_\_  
**Date**

HAVE THIS FORM SIGNED BY A TRUSTEE OR AUTHORIZED REPRESENTATIVE AND THEN HAVE IT FAXED TO RETIREMENT PLANNERS AT (703) 893-7325 OR SCAN TO HELP@RETIREMENTPLANNERS.COM