



More than just administration . . .

REQUEST FOR LOAN DISTRIBUTION – PENSION PLAN

Employer Name _____		
Employee Name _____		
Employee Address _____		
Street		

City	State	Zip

DOH ____/____/____ DOB ____/____/____ Marital Status M____ S____
 SS# _____ Phone number (____) _____
 Email Address _____

Number of hours employee has worked since the beginning of the plan year: _____

Is there any year in which the employee did **not** work the required number of hours to receive credit for a year of service? Yes _____ No _____ If yes, please provide information below.

Reason for loan request:

_____ Purchase of a primary residence
 _____ Other

****Minimum loan amount is \$1,000.00****

- Check box for “Maximum” Amount Available
- Check box for “Fixed” Amount Requested \$ _____
- Check box for Loan requested \$ _____ (OR) Maximum amount available if less.

Desired term of loan # _____ months or # _____ years (1 to 5 years)

Plan must have approved loan provision. Limits apply.

Notes: _____

Prepared by _____ Date: ____/____/____