

# APPLICATION FOR PRELIMINARY LOAN CALCULATION REQUEST

PLAN NAME:

PARTICIPANT:

Amount Loan Requested:

Check if Maximum is Needed:

Rate of repayment:

Next Payroll Date:

Length of loan term requested  
except in limited circumstances)

months (cannot exceed 60 months

Please indicate of the loan is for a primary residence:

**Participant Approval for Loan Calculation:**

I hereby make this request for a loan calculation to be completed, and if acceptable, final paperwork to be forwarded to me for completion.

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

\_\_\_\_\_  
Date

**Trustee Approval to Proceed With Loan Calculation:**

\_\_\_\_\_  
Trustee or Authorized Signer Signature

\_\_\_\_\_  
Date