

**APPLICATION FOR PARTICIPANT LOAN**

I hereby apply for a loan from the Plan. In support of this loan application, I attach such information which the Plan Administrator may require to determine whether I qualify for the loan, including financial statements and tax returns. I also authorize the Administrator to secure any credit reports to determine my creditworthiness and ability to repay the loan.

Participant's Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Marital Status:  Married     Single

Purpose of Loan: \_\_\_\_\_

Amount of Loan Requested: \_\_\_\_\_ \$ \_\_\_\_\_

Repayment Period: \_\_\_\_\_  
(Maximum term of loan is 5 years, except for purchase of a home)

I understand that the loan fee is \$ \_\_\_\_\_ and that the loan will not be processed until the fee has been paid.

- I wish to have it paid out of the loan proceeds.
- I will pay it as follows: \_\_\_\_\_

In applying for this loan, I hereby acknowledge the following:

- ◆ I have read the section of the Summary Plan Description governing plan loans and have been furnished with a copy of the Participant Loan Procedure.
- ◆ I do not have a previously issued loan that has been defaulted under any plan sponsored by this Employer.
- ◆ I hereby give my authorization to have loan payments made via payroll deduction.
- ◆ I understand that if I terminate employment and still have a balance outstanding on my loan, I will be required to repay the outstanding balance on the loan in its entirety or it will be distributed to me as taxable income.
- ◆ I understand that if I default on the loan (stop making payments), the entire outstanding loan balance will be taxable to me.

---

**Trustee's Authorization**

Loan is:     Approved  
               Denied, for the following reason(s):

\_\_\_\_\_  
\_\_\_\_\_

Dated: \_\_\_\_\_ Signature of Trustee: \_\_\_\_\_

Signature of Participant: \_\_\_\_\_

Please forward the Application and the \$ \_\_\_\_\_ Loan Processing fee to:  
The Retirement Company, Inc.  
2659 Townsgate Rd., Suite 101  
Westlake Village, CA 91361  
Telephone: (805) 371-9222  
FAX (805) 371-9272

Please note that the loan will not be processed until the loan fee has been paid.