

**LOAN APPLICATION  
DEFINED CONTRIBUTION PLAN**

Plan Name: \_\_\_\_\_ Date: \_\_\_\_\_

Participant's Name: \_\_\_\_\_ SSNO: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Date of Hire: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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

Amount of Loan Requested (you may specify maximum): \$ \_\_\_\_\_

Balance of Unpaid Loan(s) on this Date (if any): \$ \_\_\_\_\_

Number of Months to Repay this Loan (maximum 60): \_\_\_\_\_ Months

How is participant paid? (Bi-weekly, weekly, etc.) \_\_\_\_\_ Next pay period end date \_\_\_\_\_

- Check (will be mailed to Plan Sponsor)
- Debit ACH (if available, if not a check will be mailed):  
 Bank Name \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_  
 Bank Routing Number \_\_\_\_\_  
 Account Number \_\_\_\_\_  
 Savings  
 or  
 Checking

Expedited check (if available) – there will be an extra \$20.00 fee for overnighting

**FEES:** Your account will be charged a one-time loan processing fee and an annual maintenance fee. See Plan Sponsor for further questions.

**NOTE:** You may not borrow against amounts set aside for other payees under a Qualified Domestic Relations Order. By signing this application, your Spouse consents to a possible reduction in the benefit which would otherwise be payable in the event of your death prior to retirement. Signature of spouse may or may not be required, see your summary plan description.

\_\_\_\_\_  
Signature of Spouse Date

**Participant's Certification (required)**

- I hereby acknowledge that a fee will be taken from my account for a one-time processing fee and annual maintenance fee.
- I hereby acknowledge that re-payments on the loan must be made through payroll deduction.

\_\_\_\_\_  
Signature of Participant (required) Date

\_\_\_\_\_  
Signature of Authorized Signer Approving Loan (required) Print Name of Authorized Signer

\_\_\_\_\_  
Date

National Administration Inc. – Phone 920-733-7141 email distributions@nai-net.com Fax 920-364-2450 mail to:  
878 W. Airport Road, Menasha, WI 54952 – Lynn Sonkowsky, Senior Transaction Coordinator