



**Pension Planners, Inc.**  
Plan Design & Administration

**LOAN REQUEST FORM**

*(If permitted by your plan document)*

PLAN NAME: \_\_\_\_\_

PARTICIPANT'S NAME: \_\_\_\_\_

PARTICIPANT'S ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

DOLLAR AMOUNT REQUESTED: \_\_\_\_\_ LOAN#: \_\_\_\_\_

DATE OF LOAN: \_\_\_\_\_ CONSOLIDATED: (YES) (NO)

FIRST PAYMENT BEGINS: \_\_\_\_\_

% RATE: \_\_\_\_\_ *(This rate is determined by your plan document. It is generally prime plus 1%. This will be completed by Pension Planners after review of the plan document.)*

NUMBER OF YEARS: \_\_\_\_\_ *(No greater than 5 years unless to purchase participant's principal residence.)*

- PAYMENT METHOD:
- Monthly: 12 Payments
  - Weekly: 52 Payments
  - Quarterly: 4 Payments
  - Bi-Weekly: 26 Payments
  - Twice a Month: 24 Payments

AMOUNT OF PAYMENT :\$ \_\_\_\_\_ ( To be calculated by Pension Planners who will provide a loan amortization schedule.)

\_\_\_\_\_  
Employer Signature/Authorization)

\_\_\_\_\_  
Date

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Please complete this form and return to Pension Planners, Inc. either by:  
Fax: (239)598-9812  
Mail: Pension Planners, Inc., 1045 Crosspointe Drive, Suite 2  
Naples, FL 34110  
Email: joanneraley@pensionplanners.net