

# Notice of Loan Request

**Fees Disclosure:** Submission of this form to TriStar constitutes a request for loan distribution paperwork, for which fees will be charged to the appropriate party. Due to the time involved in this process, these fees will be charged regardless of whether or not the participant returns the paperwork to us for processing, or allows it to expire after 180 days.

**Please be aware that we have received a request for a loan from a participant in your plan.**

**Instructions:** Please complete this form and send to TriStar Pension Consulting. Forms which are not completed in full will delay the loan process. The initial loan documentation will then be sent directly to your participant for their signature. Once we have received their executed loan agreement, we will forward to you a check request for trustee signature and a copy of the amortization schedule so that you may begin withholding the proper loan payments from their pay. Please note that these payments must be withheld on an after tax basis each pay period, submitted to the fund company immediately following the withholding, and when submitted, classified as a loan payment rather than a contribution to the plan.

**Plan Name:** \_\_\_\_\_

**Participant Information:**

**First Name:** \_\_\_\_\_ **Middle Name:** \_\_\_\_\_ **Last Name:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_/\_\_\_\_/\_\_\_\_ **Last 4 of SSN:** \_\_\_\_\_ **E-Mail:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Address:** \_\_\_\_\_ **City:** \_\_\_\_\_ **State:** \_\_\_\_ **Zip:** \_\_\_\_\_

**Participant Employment Information:**

**Date of Hire:** \_\_\_\_/\_\_\_\_/\_\_\_\_ **Date of Termination:** \_\_\_\_/\_\_\_\_/\_\_\_\_ **Hours worked in current plan year:** \_\_\_\_\_

**Hours worked in previous plan year:** \_\_\_\_\_ **Last Payroll Date:** \_\_\_\_/\_\_\_\_/\_\_\_\_ **Next Payroll Date:** \_\_\_\_/\_\_\_\_/\_\_\_\_

**Payroll Frequency:** \_\_\_\_\_

**Participant Loan Information:**

Does the participant have an outstanding loan balance?    YES            NO

Number of loan payments since last valuation? \_\_\_\_\_ Total loan repayment amount since last valuation? \$ \_\_\_\_\_

Date of last loan payment (mm/dd/yy)? \_\_\_\_\_

Have all current year loan payments as well as loan payments receivables from prior plan years been paid into the plan for this participant?    YES            NO

**Additional Comments:**

Completed By: \_\_\_\_\_ Phone: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

**Return completed form to TriStar Pension Consulting by  
Fax: (405) 418-4015 or by E-mail: [Tiana@tristarpension.com](mailto:Tiana@tristarpension.com)**