Principal Trust Company

A member of

Principal® Financial Group

Mailing Address:
P.O. Box 8963
Wilmington, DE 19899-8963
800-209-9010 Fax: 302-999-9554

Request for Loan Package

I. Participant Information (Please print or type)

☐ Profit Sharing ☐ Individual 401(k)	Email Address		
Plan Name	Investment Firm & Account Number		
Participant Name	Phone / Fax Number	Social Security Number	
Participant Address	City	State	ZIP Code

II. Loan Terms

Current Vested Account Balance $	Amount of Loan $
Loan Interest Rate (determined by Plan Administrator/Employer) %	Term of Loan (Months)
Frequency of Loan Payments: ☐ Monthly ☐ Quarterly	Purchase of Principal Residence: ☐ Yes ☐ No

IMPORTANT NOTE: Loans must be made according to the loan program spelled out in the Basic Savings or Basic Defined Contribution Plan. Please refer to Section 5.06-Loans to Participants. Following are some of the provisions that may assist you in the completion of this form.

- Participants are limited to one outstanding loan
- Loan payments are to be made at least on a quarterly basis over the term of the loan. Principal Trust Company only recordkeeps loans made on a monthly or quarterly basis.
- The minimum amount of any loan shall be $1,000
- The amount of the loan must not exceed the lesser of $50,000 reduced by the highest outstanding loan balance in the last 12 months or 50% of the participant's vested balance reduced by any outstanding loan balance.
- The term of the loan can extend further than five years if the loan is for the purchase of a principal residence.

A loan package will be sent to you based on the information provided on this form. The Loan Package consists of a Loan Application and Agreement, Federal Truth-in-Lending Disclosure Statement, and Loan Withdrawal Request. You will need to return the entire loan package to us with your $125 fee payment. The $125 fee payment covers the loan acceptance fee as well as the first year annual loan fee. Upon receipt of the original loan package and fee payment, we will authorize the issuance of your loan check.

III. Participant Signature

Participant Signature	Date

IV. Plan Administrator Signature

The Plan Administrator is responsible for loan administration as outlined in the plan document and service agreement. As Plan Administrator, I have reviewed and approved the terms of the loan as stated above.

Plan Administrator Signature	Date

Please send this completed form to:

Principal Trust Company
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or Fax to:

302-999-9554