# Loans Requiring Supporting Documentation

If your plan permits loans only for specific reasons (i.e. defined financial hardships), the allowable reasons are shown to participants as part of the online loan request process and they are advised that they must attach supporting documentation to the request:

## Loan Request

Overall Progress: **67% Complete**

Return to transaction selection

### Promissory Note & Disclosure Statement

Your plan requires supporting documentation to be attached demonstrating that the eligibility requirements for this loan have been met. Please click the paperclip icon above to upload your documentation before proceeding.

By checking the boxes below and continuing, you are agreeing to all of the statements on this page.

☐ You are submitting a personal loan distribution for $ 1,000.00 at an interest rate of 5.75 % that will be paid back in 10 equal payments of the amount modeled as part of this request over a period of 4 months.

☐ You are consenting to repay the loan through payroll deductions according to the terms above and detailed in the Amortization Schedule shown on your screen. A copy of the amortization schedule is stored online and can be viewed online once the loan is processed. The payment of this loan is secured by your vested and non-forfeitable interest in the Plan. You understand and agree that if your loan repayment is not made in accordance with your agreed upon terms and the terms of the plan, your loan may be deemed in default and the outstanding loan balance may become taxable. Please refer to your loan policy if you have any questions.

CANCEL     BACK     NEXT >>

When you review the loan, click "View" in the Transaction Summary column. Click on the paperclip icon to see any attachments uploaded by the participant.

| Current status | Participant name | Request date | Transaction type | Transaction summary | Payment details | Approve/Cancel request |
|---|---|---|---|---|---|---|
| Pending | Thomas Jefferson | 07/05/2022 | Loan Distribution | View | View | Select One |

Thomas Jefferson

## Loan Request

Return to transaction request approval screen

### Confirmation

✓ Confirmation Number: 1329865

Your request has been processed. You may use this number to reference this transaction in the future.
Requests, while processed into the database, may not take effect immediately. Some requests may still need to be approved before they will take effect.

### Personal Information

| | | | |
|---|---|---|---|
| Name: | Thomas Jefferson | Street address 1: | 55 Walkers Brook Drive |
| Marital status: | B | Street address 2: | |
| Sex: | M | City: | Reading |