

**Sheet Metal Workers' International Association
Local Union No. 73 Annuity Plan
Hardship Loan Application**

EMPLOYEE INFORMATION

Borrower (Please print or type): _____

Social Security Number: _____

Address: _____

Mailing Address: _____

Phone Number: () _____ Cell Phone: () _____

Email Address: _____

Currently married (*check one*) Yes No

I. REQUEST FOR HARDSHIP LOAN

I hereby apply for a loan of \$_____ from the current value in the Plan as directed below:

II. PURPOSE OF HARDSHIP LOAN

III. REPAYMENT OF HARDSHIP LOAN

My hardship loan is to be repaid in _____ payments and must be paid at least monthly (cannot exceed 5 years).

IV. PLAN RULES RELATING TO HARDSHIP LOANS

Plan rules governing the operation of this hardship loan program are attached hereto and are made part hereof by reference.

I have read and understood all portions of the hardship loan application including the attached addendum _____ and affix my signature hereto as evidence thereof this _____ day of _____ 20____.

Employee's Signature _____

I hereby consent to this hardship loan to my spouse and waive all rights to receive the proceeds in the form of a Joint and Survivor Annuity.

Spouse's Signature _____

State of _____

County of _____

On the _____ day of _____, 20 before me came _____ to me known and known by me to be the persons described in and who executed the foregoing statements and they duly acknowledged to me that they executed *the* same.

Notary Public

OFFICE USE ONLY

HARDSHIP LOAN APPROVED:

Original Balance _____

Rate _____

Number of Payments _____

Payment Amount _____

Type _____

By: _____

Date _____

Check No. _____ Issued by _____

Date: _____