

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

EMPLOYEE INFORMATION

Borrower (Please print or type): _____

Social Security Number: _____

Address: _____

City, State, Zip: _____

Phone Number: () _____ - _____
Area Code

Currently married (*check one*) Yes No

I. REQUEST FOR LOAN

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

II. PURPOSE OF LOAN

III. REPAYMENT OF LOAN

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

IV. PLAN RULES RELATING TO LOANS

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

I have read and understood all portions of the 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 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

LOAN APPROVED:

Original Balance _____

Rate _____

Number of Payments _____

Payment Amount _____

Type _____

By: _____

Date _____

Check No. _____ Issued by _____

Date: _____