

**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 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

SEAL

OFFICE USE ONLY

HARDSHIP LOAN APPROVED:

Original Balance _____

Rate _____

Number of Payments _____

Payment Amount _____

Type _____

By: _____

Date _____

Check No. _____ Issued by _____

Date: _____