

Use this form to request a loan disbursement or to refinance existing loan(s).

1 Plan and participant information

Please type or print clearly.

Important: Loan requests are subject to a 10-day hold after an address change. If the participant's address has changed in the last 10 calendar days, this request will be delayed.

| | | | | | | | | | | | | |
|-----------------------------------|----|------|------------------------------------|---|------|-------|-----|---|--|--|--|--|
| Plan name | | | Plan ID number | | | | | | | | | |
| First name of participant (print) | MI | Last | X | X | X | - | X | X | | | | |
| | | | SSN (provide the last four digits) | | | | | | | | | |
| Address of participant | | | | | City | State | ZIP | | | | | |

2 Loan request

Complete **A** or **B**. Loan payments must be remitted via the Plan Sponsor website. Loan amounts are taken proportionately from all investment options in applicable contribution types.

Note: A loan shall be deemed to be in default when a scheduled installment payment is not made by the second to last day of the calendar quarter following the calendar quarter in which the payment was due. If the payment is not received within such stipulated time period, the loan is considered to be in default and **will be tax reported**. For additional details, refer to the Loan Default Procedures section of the online plan administration guide at www.americanfunds.com/retiresponsor.

A. Request new loan.

Loan amount \$ _____ Interest rate _____% Number of payments _____

First loan payment due on _____ (mm/dd/yyyy) Duration _____ (months) Anticipated payment amount \$ _____

Frequency of payments: Weekly Every other week Semimonthly Monthly Quarterly

B. Refinance existing loan(s).

This section can be used to re-amortize an existing loan, or to consolidate existing loan(s) and request additional proceeds, if applicable.

1. Indicate the existing loan(s) to be refinanced:
- All existing active loans
 - Active loan ID number(s) _____

2. Provide the payoff amount for the loan(s) referenced above \$ _____

Note: You **must** freeze any outstanding loan(s) in order to obtain the payoff amount. Please ensure the loan(s) have been frozen prior to submitting this request.

3. Indicate the amount of additional loan proceeds being requested (if applicable) \$ _____

4. New refinanced loan amount \$ _____ (This amount is the sum of lines 2 and 3.)

Interest rate _____% Number of payments _____

First loan payment due on _____ (mm/dd/yyyy) Duration _____ (months) Anticipated payment amount \$ _____

Frequency of payments: Weekly Every other week Semimonthly Monthly Quarterly

