

AFter THIS FORM HAS BEEN COMPLETED AND SIGNED  
BY THE PARTICIPANT AND THE PLAN REPRESENTATIVE,  
FAX, SCAN, OR MAIL IT TO SUNBURST PENSION SERVICES:

FAX: (480) 491-6520  
2919 E. Menlo St., Mesa, AZ 85213

### LOAN APPLICATION

(Please Print)

**Participant Name (Borrower)** \_\_\_\_\_ **SSN** \_\_\_\_\_

**Participant Address** \_\_\_\_\_  
Street City State Zip Code

**Company (Plan) Name** \_\_\_\_\_

**Amount Requested:** \$ \_\_\_\_\_

**Length of Loan:** \_\_\_\_\_ years or \_\_\_\_\_ months (Not to exceed 5 years)

**Frequency of Payroll:** \_\_\_ Quarterly \_\_\_ Monthly \_\_\_ Semi-Monthly \_\_\_ Bi-Weekly \_\_\_ Weekly

### PROMISSORY NOTE

FOR VALUE RECEIVED, the borrower promises to pay to the order of the Trustee of the above Plan the above principal amount plus interest. Said principal and interest thereon will be paid in accordance with the amortization schedule, which will be supplied.

At the option of the undersigned, at any time, all or any portion of the unpaid principal sum and accrued interest on this note may be prepaid without premium or penalty; the amount of the prepayment to be applied first to accrued interest and the remainder to unpaid principal.

The payment of this note is secured by the vested and nonforfeitable interest of the undersigned in the above Plan and Trust. At the election of the holder or holders hereof, upon notice to the undersigned, the unpaid principal sum, together with accrued and unpaid interest thereon, shall become due and payable in the event of a default in the payment of any principal or interest when due in accordance with the terms hereof.

### SIGNATURES

\_\_\_\_\_  
**Participant's Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Authorized Plan/Trust Representative**

\_\_\_\_\_  
**Date**