

Plan name: _____

Plan number: _____

Coronavirus-related Loan Form

Coronavirus-related loans must be received before market close on September 22, 2020.

Step 1: Your information

Print in block letters in black or blue ink. Do not write outside the boxes. All requested personal information is required to be completed.

First name

MI

Last name (Entire name must match the name on file.)

U.S. Social Security number/
U.S. Taxpayer Identification number

Date of birth
(mm/dd/yyyy)

Account extension
(if this applies)

Account address

City

State

ZIP Code

Step 2: Instructions

By signing below, I certify:

- (i) I have been diagnosed with the virus SARS-CoV-2 or with coronavirus disease 2019 (COVID-19) by a test approved by the Centers for Disease Control and Prevention; or
- (ii) My spouse or my dependent (as defined in §152 of the Internal Revenue Code (IRC) of 1986) have been diagnosed with such virus or disease by such a test, or;
- (iii) I have experienced adverse financial consequences due to such virus or disease because of one or more of the following reasons:
 - I was quarantined.
 - I was laid off or furloughed.
 - My work hours were reduced.
 - I was unable to work due to lack of child care.
 - I had to close or reduce working hours for the business I own or operate.
 - Other factors as determined by the Secretary of the Treasury.

First loan repayment due date - Select one:

- As a Qualified Individual, I elect to delay any repayments on this loan between March 27, 2020 and December 31, 2020. I also acknowledge and agree the loan will be reamortized and extended by the length of the suspension to account for any delayed repayments plus accrued interest.

If I later change my mind and want to start my loan repayments before the suspension period ends, I must call for additional instructions on how to adjust my loan payment start date. Otherwise, any loan payment may be returned to me and not credited towards the outstanding loan balance.

- Do not suspend my first loan repayment due date until December 31, 2020. I agree to make level loan payments over the term of the loan I request on the attached loan application.

Step 3: Signature and consent

My consent:

I understand and agree to all pages of this form and affirm all information is correct.

I understand that I must complete this form and attach a completed Loan Application form. This Coronavirus-related loan form supersedes the "maximum loan" section on the attached Loan Application. I understand that the maximum amount I may request on the attached Loan Application for a Coronavirus-related loan cannot exceed the lesser of: (1) 100% of my vested account balance; or (2) \$100,000, minus the highest outstanding loan balance I may have had in this plan during the last twelve consecutive months.

Any person who presents a false or fraudulent claim is subject to criminal and civil penalties.

My signature

Date (mm/dd/yyyy)

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An original, handwritten signature is required on this form.