



MOMENTUM SERIES

LOAN REQUEST FORM

I. BACKGROUND INFORMATION

Participant's First Name, Middle Initial _____

Last Name _____

Social Security Number _____

Is the participant married? Yes No (If yes, see Spousal Consent in Section IX.)

Employer's Name _____

Contract ID Number _____

II. AMOUNT OF THE LOAN

The maximum loan amount is 50% of your vested Retirement Account Value up to \$50,000. The minimum loan amount is \$1,000. For further details, please contact your Plan Administrator or a Momentum Customer Service Consultant at (800) 528-0204.

A. For a maximum loan, please check here

B. The following loan amount is requested from the Retirement Account Value of the Participant: \$ _____

III. VESTING PERCENTAGE AND INTEREST RATE

A. The participant's non-forfeitable vesting percentage is: **(Basic Service Clients Only)**

Employer Matching Contributions _____% Employer Contribution _____% (Eg., Profit Sharing Contributions)

Other Contributions _____% (Eg: Direct Transfer from a Prior Pension Plan of the same employer.)

B. The Annual Percentage Rate of Interest on this loan is (determined by the Plan Administrator): _____%

IV. WITHDRAWAL INSTRUCTIONS (✓ only one)

I hereby request that the amount indicated in Section II should be taken from the following Investment Option(s). If nothing is specified, box (a) will apply. All loans will be taken pro rata from all vested sources.

(a) Pro rata from all Investment Options

(b) From the Investment Option(s) designated below: (All sources within the Investment Options will be used to the extent available.)

V. LOAN REPAYMENT INSTRUCTIONS (✓ only one)

I am requesting that loan repayments be reinvested in the following manner:

(a) In accordance with the withdrawal instructions in Section IV.

(b) Into the Plan's Default Fund (either the Guaranteed Interest Option or Alliance Money Market Fund).

(c) In accordance with my Investment Allocations in effect when loan repayment is processed.

If Equitable does not receive your loan repayment through payroll deduction, a certified check or money order is the required form of payment.

