

**FOR OFFICE USE ONLY:**

- a) Balance of individual's account as of December 31, 19... is ..... \$ .....
- b) 50% of above balance ..... \$ .....
- c) Amount of Loans outstanding ..... \$ .....
- d) Line c minus Line b ..... \$ .....
- e) Applicant appears eligible for loan of ..... \$ .....
- f) Amount of loan applied for and proof submitted ..... \$ .....  
(may not exceed the lesser of line e or f, above.)

Committee recommends Approval  Rejection  (Reason ) .....

..... Date ..... Date .....

committee member trustee                      committee member trustee

Committee action Approved  Rejected  at Board of Trustees' meeting on...

..... Date .....

Fund Manager/Asst. Mgr.

**Eligibility**

- A Loan:  Bill of Sale or Agreement to Purchase
- Registration

Correspondence

- B Loan:  Eligible
  - Last work date.....
  - Hours last qtr.....
- Letter sent.....
- re:.....
- Reply:.....

E Loan:  Bill or contract

F Loan:  Bill or contract

H Loan:  Contract or Paid Bill

I Loan:  Paid health claims

Bills

M Loan:  Mortgage commitment

Contract

Vacation assignment

**COMMENTS:**

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