Completing a Loan Request

Questions? Call us at 800-880-2776

Please consult your financial representative or National Plan Administrators at 800-880-2776 regarding the availability of loans within your voluntary retirement plan.

While your plan may permit loans, your investment product may not, therefore you should also consult with your investment provider or representative regarding the availability of loans within your specific contract/account.

1. Contact your representative or investment provider to get a copy of the loan paperwork required to process a loan. Your investment provider may have additional restrictions on loans that differ from your voluntary retirement plan. Your investment provider will provide you with the loan repayment options and establish a repayment plan.

2. Complete the transaction authorization form indicating your desire to process a loan from your plan. This form is available on our web site.

3. Submit the transaction authorization form and loan request paperwork required by your investment provider to the address listed on the bottom of the transaction authorization form. Your representative can assist you in completing the forms necessary to complete the loan distribution.

4. Once the loan request is reviewed and approved, it will be forwarded to the applicable investment provider for processing.

5. Your investment provider will send you the proceeds from your loan once the request is processed.

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