

<b>Participant(s) Loan Conversion Correction</b>
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<b>Plan Information</b>
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Plan Name:
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Plan Number:
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<b>Participant Information</b>
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Participant Name:
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Participant SSN or ID:
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Original Loan Effective Date:
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Original Loan Amount:
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Original Converted Loan Balance:
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Repayment Amount:
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Loan Maturity Date:
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First Post-Conversion Due Date:
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Interest Rate:
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Loan Type (General or Mortgage):
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Term (i.e. 60 months)
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Repayment Type (i.e. Payroll):
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Repayment Frequency:
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Currently in Default (Yes or No):
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<b>Instruction and Authorization</b>
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I have reviewed and understand the Instructions and Information section attached to this form and I am authorized to request this correction.
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Plan Representative's Name:
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Plan Representative's Title:
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Plan Representative's Signature:
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Date:
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Plan Representative's Phone Number:
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Plan Representative's Fax Number:
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**Instruction and Information Attachment  
Participant(s) Loan Conversion Correction**

**When to Use this Form**

If you believe a correction is required because of a recordkeeping error made by the Service Provider, please contact your Plan Representative for assistance. Otherwise, please complete the appropriate Correction Form

Indicative data regarding a participant Loan is incorrect due to Loan Conversion information received from a Prior Service Provider. Examples of indicative data that may be incorrect include the following:

- Loan Conversion Balance
- First Payment Due Date
- Interest Rate
- Repayment Amount
- Repayment Frequency
- Repayment Method

**Correction Highlights**

These instructions do not act as authorization to remove a participant loan from default status.

Before submitting this form, you may want to discuss with your ERISA consultant.

Service Provider will follow the regulations under IRC Section 72(p) when a converted loan is corrected.

The correction may result in adjusted loan payment amounts.