



Participant Instructions – How to initiate an online Loan Request

How to request a loan online –

The Definiti website contains relevant information about possible withdrawals you may be able to make from your retirement plan, along with application instructions.

To access your online retirement account –

- Go to <http://planaccess.definiti.com>
- Login to your personal retirement account
 - Click on **Withdrawal Request** from the main menu and then select **Withdrawal Request** from the drop-down menu
 - The resulting screen will list available distribution types and tell you how much you are eligible to withdraw (if any). If you are not yet eligible to withdraw any funds, you will be unable to proceed further.

DEFINITI

Participant name: Selena Gomez

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Plan Selection

Withdrawal Request

Withdrawals ⚠	Termination Distribution	Loans
Partial Withdrawal	Select a termination type	Select a loan type
Withdraw up to \$117,703.58	Withdraw up to \$0.00	Borrow up to \$50,000.00
You have 0 outstanding loan		
What you should know	What you should know	What you should know

- Choose the type of Loan you desire – more than one “type” may be available – and select **GET STARTED**
- Review the General Information and click **NEXT** if you agree.
- Complete the empty fields on the right of the page and select **CALCULATE**

Overall Progress: **17% Complete**

[Return to transaction selection](#)

Loan Amount

Select the type of loan you would like to receive. Use the loan calculator to specify the amount of your loan and to determine your ideal payment amount.

Loan Limits	General Purpose Loan
Current plan vested acct. balance	\$97,203.58
Minimum loan	\$1,000.00
Maximum loan	\$50,000.00
Minimum duration	1 Months / 2 Payments
Maximum duration	60 Months / 120 Payments
Days to complete request	5

Loan Fees	Fee Amount
Origination fee	\$120.00
Per payment processing fee	\$0.00
Annual maintenance fee	\$12.50

Loan Type
General Purpose Loan

Rate
4.25%

Loan amount
0

of payments
0

Your payment

CALCULATE

[CANCEL](#) [BACK](#) [NEXT >>](#)

- You can change the loan amount and number of payments, as long as it is within the loan limits
- Once you are comfortable with the loan amount, number of payments and your payment amount, select **NEXT**.
- Verify your Personal Information and Email and Email Confirmation Information.
 - **Please double check that the e-mail address(es) on file are correct. This is how we will communicate with you. Any errors may delay the process.**
 - Select **NEXT**.
- Select your desired Payment Method.
 - Check
 - Any Address entered here will be verified against the address we currently have on file. For security purposes, if the two are different, we will need to verify the address change with your employer. This may delay the process.
 - ACH (Direct Deposit)
 - Your name must be on this bank account. If you do not currently have a bank account, please select the Check for your payment method.
- Click on **NEXT**
- Carefully read each disclaimer. If you agree, check each box; click on **NEXT**
- Review the information one final time before applying for the loan – Click on **SUBMIT**
- Please write down and retain your Confirmation Number. We will ask you for this number if you contact us with any withdrawal-related questions or concerns.

PLEASE NOTE: THE LOAN REQUEST STILL NEEDS TO BE APPROVED BY THE PLAN SPONSOR.