

Sample Loan Request Process

To initiate a loan request, follow these steps.

STEP 1 – Log in to Retirement Manager (<https://www.myretirementmanager.com/>) and click on the *Loan Certificate* link in the Disbursement Menu page.

403b Plan - Request for Loan Certificate

Loan transactions on record:

Vendor Name	Loan ID	Original Loan Effective Date	Original Loan Amount	Loan Status	Current Outstanding Loan Balance	Highest Loan Balance Previous 12 Months
Provider 1	LOAN4	08/21/2008	\$1,000.00	Default	\$1,000.00	\$1,000.00
Provider 1	LOAN2	01/02/2008	\$1,500.00	Active	\$1,400.00	\$1,500.00
Provider 1	LOAN3	01/02/2008	\$1,500.00	Active	\$1,400.00	\$1,500.00
Provider 3	1	05/28/2004	\$4,500.00	Active	\$1,375.00	\$3,250.15

Please add Loan transactions not listed above: [Add New Row](#)

#	Vendor Name	Loan ID	Original Loan Effective Date	Original Loan Amount	Loan Status	Current Outstanding Loan Balance	Highest Loan Balance Previous 12 Months	Action
1	--Select vendor--	U#####		0.00	--Select--	0.00	0.00	Delete Row

STEP 2 – Verify previous loan transactions.

- Check your loan transactions on record.
- Click *Add New Row* to enter any additional loan transactions that are not listed.

Please add Loan transactions not listed above: [Add New Row](#)

#	Vendor Name	Loan ID	Original Loan Effective Date	Original Loan Amount	Loan Status	Current Outstanding Loan Balance	Highest Loan Balance Previous 12 Months	Action
1	--Select vendor--	U#####		0.00	--Select--	0.00	0.00	Delete Row

Is the requested loan for the purchase of a principal residence? --Select--

STEP 3 – Enter your loan request.

- Indicate if the loan will be used to purchase a principal residence.
- Click *Add New Row*. Select vendor and enter requested loan amount. Your Account Balance and the As of Date of that balance will display for the selected vendor. Click *NEXT* to complete or *CANCEL* the transaction.

Please select the vendor and input the amount of the loan: [Add New Row](#)

#	Vendor Name	Account Balance	As of Date	Requested Amount	Action
1	Provider 2	\$14,222.09	11/30/2008	0.00	Delete Row

STEP 4 – A Disbursement Eligibility Certificate will be created if your loan request is eligible under the plan. Print and attach this certificate to your vendor's loan paperwork and submit to the vendor from which you are requesting the loan.