

Loan prepayment forms are created real time which allows us to take into account current outstanding loan balances and pending loan repayments awaiting processing. To access a loan prepayment form or review instructions for submitting a loan prepayment please follow the instructions below:

To View a Loan Prepayment Amount, Download a Form and review Participant and Plan Sponsor Instructions:

1. Select "**Employee Look Up**" under "**Manage Employees**"
2. Input the employee's social security number or search from your full list of employees to locate participant in question.
3. Select "**Employee Home**"
4. Under "**Loans & Withdrawals**" select "**View or Request a Loan**"
5. Select "**Loan Payoff**"
6. You will be brought to the **Loan Payoff Information** screen and you will see the following:
 - Current Outstanding Loan Balance
 - Pending Loan Payment (if applicable)
 - Loan Payoff Amount
 - Payoff Valid Until Date
7. If you would like to download the form to submit or to review instructions, select **Download Loan Prepayment Form**. This form will automatically populate with the following information:
 - Loan #
 - Loan Payoff Amount
 - Payoff Amount Valid Until Date
 - Trustee Name
 - Plan Number.

(For security purposes the participant name and social security number will not be automatically populated and must be completed by the participant or Plan Sponsor)

The form will include detailed instructions for reviewing and submitting the loan prepayment for both the Participant and the Plan Sponsor.