



**KANSAS BOARD OF REGENTS (KBOR)
VOLUNTARY PLAN LOAN REQUEST- 403(b)**

PARTICIPANT INFORMATION (Shaded sections require completion)

Name (last, first, middle initial)	Social Security Number (Required)
Residential Street Address	Date of Birth (mm/dd/yyyy)
City, State, Zip	Daytime Phone #
E-mail Address	University

\$

Amount Requested

*** Name of Investment Provider your requesting loans from**

* If this Investment Provider is not on the Approved Provider list, you must submit proof that loans are allowed in your contract with that Investment Provider and the Investment Provider must have completed an Information Sharing Agreement with the Kansas Board of Regents. A list of Investment Providers that have completed the KBOR Information Sharing Agreement can be found at <http://kansasregents.org/download/vtsa.html> in sections I and II, as well as those in section III designated with an +.

You may want to consider a contract exchange to one of the approved providers which will allow planwithease.com to administer this process in a more timely manner.

You must disclose assets held by all KBOR 403(b) Plan Investment Providers and you must submit copies of all your most recent quarterly statements from those Investment Providers who hold assets in your name. These statements will be used by KBOR and your university in determining the amount you have available to borrow.

Please list below all KBOR 403(b) Investment Providers for whom you are submitting statements:

1.) _____ 2.) _____ 3.) _____

Once the loan has been calculated and approved, your signed request will be returned to you for you to submit to your Investment Provider for processing. By signing below you are attesting that you have supplied all pertinent information requested.

Participant Signature

Date

KBOR/STATE UNIVERSITY SECTION

Amount Approved \$ _____

KBOR State University HR/Benefits Signature _____ *Date* _____

This signature and authorization is valid for 30 days from the date signed.

Verified information with planwithease.com Yes No

Mail or fax this completed information, along with your Investment Provider's loan request form and statements, to your HR/Benefits Office.

****Please visit the KBOR website to access the list of approved Investment Providers.
<http://kansasregents.org/download/vtsa.html>***