

Loan Repayment Plan Request Form

Certificate number:

Purpose of this form	Use this form to create or modify a loan repayment plan on your Certificate.
Terms used in this form	<p><i>Foresters Financial™, Insurer or We</i> mean The Independent Order of Foresters. <i>You or your</i> mean the Owner who is completing and signing this form, unless otherwise specified. <i>Certificate</i> means a Certificate issued by an Insurer. <i>Owner</i> includes Certificate Owner and Absolute Assignee.</p>

1. Owner Information

Information about the Certificate Owner.	<p>If the Insured was a minor at issue and is now the current Owner, we will require a copy of government ID (Driver's License, Passport or notarized signature) to accompany this request, unless it has been previously provided. This will ensure that there are no delays in processing.</p> <p>Owner Name (first, middle initial & last) Date of Birth (mm/dd/yyyy)</p> <p><input type="text"/> <input type="text"/></p> <p>Address Primary Phone Number</p> <p><input type="text"/> <input type="text"/></p>
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2. Create a New Loan Repayment Plan

If completing this section, you do not need to complete section 3.	<p><input type="radio"/> Please set up a scheduled loan repayment of \$ <input type="text"/> to be added to my premiums. (Minimum equivalent of \$25.00 per month)</p> <p><input type="radio"/> For Foresters Universal Life only—Redirect my premium payments toward the loan balance.</p> <p><input type="radio"/> For Paid-up Certificates—Please set up a scheduled loan repayment of \$ <input type="text"/> (Minimum equivalent of \$25.00 per month). A completed Request for Pre-Authorized Checking Plan form must be submitted with this request.</p>
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3. Modify an Existing Loan Repayment Plan

If completing this section, you do not need to complete section 2.	<p>I wish to modify my existing loan repayment plan by: (select one of the following)</p> <p><input type="radio"/> Modifying my existing loan repayment amount from \$ <input type="text"/> to \$ <input type="text"/> Please apply this new amount to the loan balance.</p> <p><input type="radio"/> For Foresters Universal Life only—Redirecting my current premium payments towards the loan balance.</p>
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4. Signature Section

If your request will increase the amount drafted through a Pre-Authorized Check Plan and you are not the Payer whose account is being drafted from, the Payer's signature is also required.	<p>Please remember that interest on the outstanding loan is charged as described in your Certificate. Any outstanding loan balance is deducted from any proceeds payable at time of claim and/or surrender.</p> <table style="width: 100%;"> <tr> <td style="width: 33%;">Owner - Print name</td> <td style="width: 33%;">Signature of Owner</td> <td style="width: 33%;">Date (mm/dd/yyyy)</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/> X</td> <td><input type="text"/></td> </tr> <tr> <td>Payer - Print name (If applicable)</td> <td>Signature of Payer</td> <td>Date (mm/dd/yyyy)</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/> X</td> <td><input type="text"/></td> </tr> </table>	Owner - Print name	Signature of Owner	Date (mm/dd/yyyy)	<input type="text"/>	<input type="text"/> X	<input type="text"/>	Payer - Print name (If applicable)	Signature of Payer	Date (mm/dd/yyyy)	<input type="text"/>	<input type="text"/> X	<input type="text"/>
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