EQUITY INSTITUTIONAL®

Qualified Plan Contribution and Loan Payment Submission Form

IMPORTANT INFORMATION

This form should accompany all contribution and loan payment checks sent to your investment firm. This information is vital to ensure that contributions and loan payments are identified and recorded correctly. Please work with your Investment Advisor to invest this contribution and/or loan payment.

Loan payments must be submitted in exact multiples of the loan payment amount shown on the Federal Truth-In-Lending Disclosure Statement. If you wish to pay off your loan, please submit a single payment equal to your outstanding loan balance.

The tax year of a contribution is the calendar year for which the employee deferral contribution appears on the participant's W-2 form.

1 PLAN SPONSOR INFORMATION

EMPLOYER NAME		EMPLOYER TAX ID NUMBER
EMPLOYER ADDRESS		
CITY	STATE	ZIP CODE
EMPLOYER EMAIL ADDRESS	EMPLOYER PHONE NUMBER	

2 CONTRIBUTION INFORMATION

Name	Social Security Number	Tax Year	Employee Contribution	Catch up Contribution	Employer Contribution

3 LOAN PAYMENTS

Name	Social Security Number	Loan Number	Payment Number	Payment Amount

4 TOTAL CHECK INFORMATION

PARTICIPATING OWNER CONTRIBUTION TOTAL	PARTICIPATING OWNER LOAN PAYMENT TOTAL	PARTICIPATING SPOUSE CONTRIBUTION TOTAL
PARTICIPATING SPOUSE LOAN PAYMENT TOTAL	TOTAL CHECK AMOUNT	

Please retain a copy of this form for your records and fax or mail to Equity Trust Company.