

# FlexNote Conversion Form

## Symerge

**Use this form to:**

- Transfer funds from your FlexNote account to your Symerge client account (for example, to pay Scor! Tuition)
- Convert funds from your FlexNote account into a charitable gift to Symerge.

1<sup>st</sup> Lender Name

2<sup>nd</sup> Lender Name

Street Address

City
State
ZIP

Country
Phone

Email

(The "Lender(s)")

**Transfer funds from my FlexNote account to my Symerge client account.**

**Amount:** \_\_\_\_\_

**Convert funds from my FlexNote account into a charitable gift to Symerge.**

**Amount:** \_\_\_\_\_

The amount indicated above will be transferred from your oldest FlexNote that has sufficient balance, utilizing first any interest due you on that FlexNote since your last payment, and then utilizing your principal balance.

Once signed and submitted, this FlexNote loan modification cannot be revoked by the you, the lender. Funds transferred to a client account or to a charitable gift cannot be converted/transferred back to a FlexNote.

Restrictions: FlexNote funds may not be used to pay for lodging expenses at Symerge events. Funds transferred to a client account are subject to Symerge’s normal published policies related to registration cancellation.

I agree to the terms of this FlexNote loan modification, and understand that my FlexNote payments will be re-calculated to retain the original loan term, resulting in smaller periodic payments (to be completed by Symerge).

\_\_\_\_\_  
Signature of Lender    Date

\_\_\_\_\_  
Signature of 2<sup>nd</sup> Lender    Date

**Office Use Only**    Transferred from FlexNote # \_\_\_\_\_    Effective Date of Transfer(s): \_\_\_\_\_

Interest since last pmt:\$ \_\_\_\_\_     **QB Interest** journal entry

Effective Principal Adjustment: \$ \_\_\_\_\_     **QB Principal** journal entry

New Balance:\$ \_\_\_\_\_    \*New FlexNote periodic payment: \$ \_\_\_\_\_

(\*This replaces the payment amount from the FlexNote agreement, or the most recent modification of that FlexNote)

Date of next payment: \_\_\_\_\_     **QB journal entry**     **QB new pmt**

**Pmt. Changed w/Bank**     **Confirm w/Client**