

Participant Benefit Application Survey

GENERAL QUESTIONS

1. After reading the participant application for pension benefits, did you need to contact PBGC for clarity on any part of the application?

- Yes
- No

2. While reading the instructions for the benefit application, did you find the instructions easy to follow?

- Yes
- No

3. Did you experience any frustration while filling out the application?

- Yes
- No

3a. What was frustrating to you in filling out the application? (Select all that apply)

- Getting in contact with PBGC with questions about the application
- Getting required proof documents
- Understanding optional benefit forms
- Understanding federal tax withholding options
- Other _____

4. Did you know that you could have contacted PBGC to get assistance with completing the application?

- Yes
- No

5. To complete the application, did you ask for help from any of the following? (Select all that apply)

- PBGC
- Family member/Friend
- Didn't need help

GENERAL INFORMATION AND MARITAL STATUS

6. When filling out the application, did you understand the following?

	Yes	No
PBGC's request for general information about you	<input type="radio"/>	<input type="radio"/>
PBGC's request for information about your marital status	<input type="radio"/>	<input type="radio"/>

7. Did the application clearly explain why PBGC asked if you were still employed by the employer who sponsored your plan?

- Yes
- No

8. Did you understand what types of documents were considered acceptable proof documents?

- Yes
- No

ELECTION OF BENEFIT FORM

9. Did you understand the benefit options as explained in “Your Benefit, Your Choice” fact sheet?

- Yes
- No

10. Did you understand what is meant by “benefit form”?

- Yes
- No

11. When completing the Election of Benefit Form section, did you understand how much you would receive each month with each option?

- Yes
- No

SPOUSAL CONSENT

12. Were you married when you applied for benefits?

- Yes
- No

12a. Did your spouse sign the “spousal consent” section of the application?

- Yes
- No

12b. Did you understand that your spouse’s consent was required based on your benefit form election?

- Yes
- No

12c. Was the information in the consent statement understandable?

- Yes
- No

DESIGNATION OF BENEFICIARY

13. Do you understand what will happen to your benefit after your death (e.g., whether benefit will continue and to whom, or will stop completely)?

- Yes
- No

14. Did the form clearly explain the difference between “beneficiary for continuing payments” and “beneficiary for payments due at death”?

- Yes
- No

METHOD OF RECEIVING BENEFIT PAYMENTS

You may elect to receive your payments via Electronic Direct Deposit (EDD), Electronic Transfer Account (ETA) or by mail.

15. How did you elect to receive your payments?

- EDD
- ETA
- Mail

15a. Did you have any problems with the electronic transfer of your initial deposit

- Yes
- No

16. Was PBGC’s request for information about your financial institution account understandable?

- Yes
- No

17. Did PBGC call you to verify or request additional financial information?

- Yes
- No

FEDERAL TAX ELECTION

18. Did you understand PBGC’s explanation of your options for federal tax withholding?

- Yes
- No

19. Did you understand that if you did not make an election PBGC would use the Internal Revenue Service (IRS) default (e.g., if you do not choose an option, if you choose multiple options or if the option you select is incomplete, PBGC will withhold federal income taxes as if you were a married individual with three allowances) for you?

- Yes
- No

CHECKLIST

20. After submitting your application, did PBGC contact you to request additional documents?

- Yes
- No

20b. Did you use the checklist (e.g., did you sign and date the application, did you enclose a copy of your proof of age document, etc.) to ensure that your application had all required signatures and proof documents before you submitted it?

- Yes
- No

21. After looking at the checklist, did it remind you that you missed something?

- Yes
- No

23. Do you have any suggestions for improving PBGC's participant application for pension benefits?