

Application for Financial Assistance - Recurring

Required Documents

All Documents listed are required filings (if applicable).
Provide an explanation in the "Comments" box below for any missing Document from the below list.

File:

Document Type:

Maximum file size is 25MB. It may take a minute or two to attach large files. Please click only once. To send files larger-than-25MB, please click on this link <http://PBGC.leapfile.com> for further instructions.

1. Financial Assistance Request Letter

[FinancailAssistRequestLetter.pdf](#)

2. Financial Assistance Spreadsheet (Bank Reconciliation)

[Financial Assistance spreadsheet.xlsx](#)

3. Bank statements for all cash and/or investment accounts for the period being submitted for reconciliation

[Bank Statements.docx](#)

4. Check registers since last financial assistance request

5. Benefit payment registers since last financial assistance request

6. Benefit packages

7. Results/report of death searches conducted for the months of the period submitted for reconciliation

8. Paid invoices or receipts for all expenses paid for by the plan for the period being submitted for reconciliation

9. Projected budget for funding period (estimated income, benefit payments and expenses (include copies of pending invoices to be paid))

10. Monthly reconciliation of participants/beneficiaries for the period being submitted for reconciliation. This should include participants placed into pay, removed from pay, or suspended on a monthly basis

11. Any new signed contracts, agreements (including retainer agreements) with service providers and professionals of the plan entered into since the date of the last financial assistance request

12. Calculation of any expenses shared between multiple plans and allocated to the plan for the period being submitted for reconciliation

13. Unpaid or pending invoices for all services or expenses outstanding for the plan

14. Retroactive Requests