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Form 700 – Apply for Benefits



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Apply for Pension Benefits [700]

PHOENIX STEEL CORP PEN PL PROD & MAIN CLAYMONT

How do I know if I can apply for pension benefits?

You must meet all of the following criteria:

1. You have not yet applied for benefits for this plan.
2. You have received a benefit estimate with an amount for each benefit form based on the date you want benefit payments to start (annuity date), and
3. You are eligible to begin receiving your retirement benefits, under the provisions of your pension plan, within the next 90 days.

If PBGC has approved your annuity start date that has already passed, you cannot apply online. Call 1-800-400-7242 to request a paper application form.

Please select the option below that applies to you:

Yes, I have received a benefit estimate or Optional Benefit Form letter for my annuity start date from PBGC.

What do I need to apply for pension benefits?

Be prepared so you can complete the entire application in one session. You cannot save your application online and for security purposes, your session will time out after 15 minutes of inactivity. This means you will be logged out and have to start over.

Take a minute to make sure:

- Adobe Acrobat is installed on your computer. If not, download it free from the [Adobe Web Site](#).
- Your computer is connected to a working printer.
- Spouse or other beneficiary information is handy (Social Security Number, date of birth, mailing address, and phone number).
- Your financial information for electronic direct deposit of your pension benefits is accurate.
- You can fax or postal mail copies of required proof document(s) necessary to complete your application process (list provided after completing application).
- If you are married, your spouse is able - if required, to sign the completed application in front of a notary.

No, I have not received a benefit estimate or Optional Benefit Form letter for my annuity start date from PBGC.

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My Plan Options

- [Get a Benefit Estimate](#)
- [Name Your Beneficiary](#)
- [Apply for Pension Benefits](#)
- [View Payment Dates](#)

Customer Contact Center

Got questions? Our Customer Contact Center is here to help.

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You can email us any day, 24/7. We will acknowledge receipt and get back to you with an answer within three business days.

Or you can call us Monday-Friday, 8 a.m. - 7 p.m. ET (except federal holidays).

1-800-400-7242

TTY/ASCI
Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

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Apply for Pension Benefits [700]

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- Step 1.
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- Step 2.
Choose
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- Step 3. Name
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- Step 4. Specify
Tax Withholding
- Step 5. Identify
Payment
Method
- Step 6.
Review and
Submit

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Step 1. Information About You

Personal Information

Please review your personal information for accuracy. Call 1-800-400-7242 to make any corrections.

First and Last Name
Date of Birth
Social Security Number

Please review your contact information. To make changes, select the "My Profile" tab above. (Your Application for Benefits will not be saved.)

Mailing Address
Gender
Daytime Phone Number
Evening Phone Number
Your Email Address

My Plan Options

- [Get a Benefit Estimate](#)
- [Name Your Beneficiary](#)
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1-800-400-7242

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Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

Are you currently married?

Yes, I am currently married.

* Spouse's First Name	Spouse's Middle Name	* Spouse's Last Name
<input type="text" value="Spouse First Name"/>	<input type="text" value="Spouse Middle Name"/>	<input type="text" value="Spouse Last Name"/>
Spouse's Other Name(s)		* Spouse's Gender
<input type="text" value="None"/>		<input type="radio"/> Female <input checked="" type="radio"/> Male
* Date of Marriage	* Spouse's SSN	* Spouse's Date of Birth
<input type="text" value="12/6/1999"/>	<input type="text" value="123-45-6789"/>	<input type="text" value="1/6/1939"/>
Will your spouse be your beneficiary?		
<input checked="" type="radio"/> Yes		
* Spouse's Daytime Phone Number	Spouse's Evening Phone Number	
<input type="text" value="555-555-5555"/>	<input type="text" value="555-555-5556"/>	
Spouse's Email Address		
<input type="text" value="Spouse@Spouse.com"/>		
<input type="radio"/> No		
<input type="radio"/> No, I am not currently married.		

Is there a court order?

For example - domestic relations order, divorce decree, child support order, etc. that requires some or all of your benefit be paid to a spouse, former spouse, child, or other dependent.

Yes
 No

When do you want to start your pension benefits?

This date must be the same as the one shown on your benefit estimate or Optional Benefit Form letter.

* Month * Year

Will you be employed on the date above?

In most cases, if you are still working for the employer who sponsored your pension plan, you may not start your pension benefits before you reach your Normal Retirement Age. If you are not working when your benefits start, but return to work for the employer who sponsored your pension plan before you reach Normal Retirement Age, you must notify PBGC immediately.

Yes

Before continuing your application, please call 1-800-400-7242 to confirm you are able to start pension benefits on the date above. After you have confirmed your date, continue your application by entering your employment information.

* Employer Name

* Employer City * Employer State

No

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Apply for Pension Benefits [700]

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Step 1. Information About You | **Step 2. Choose Benefit Form** | Step 3. Name Your Beneficiary | Step 4. Specify Tax Withholding | Step 5. Identify Payment Method | Step 6. Review and Submit

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Step 2. Choose Benefit Form

How do you want to receive your monthly benefit?

This question is complex and could be one of the most important financial decisions you will ever make. Your decision affects the amount of your monthly benefit and how much your beneficiary will receive after your death. Things to think about:

- The best option for you depends on your age, health, and other financial resources, as well as the age, health, and financial needs of anyone for whom you wish to provide a benefit.
- If you are married, you should discuss this choice with your spouse.
- You may also want to discuss this choice with other family members or friends and, possibly, a financial advisor.
- Your plan's automatic benefit form is the benefit form your plan would pay you if you do not make an election. Your automatic benefit form may be the same as one of the PBGC optional benefit forms.

The following information can also assist you in making an informed choice:

- If you are unmarried**, you may choose your plan's automatic benefit form for unmarried participants or any of the PBGC optional benefit forms described below. This automatic benefit form in most plans is a straight-life annuity or a certain-and-continuous annuity (C, H-J).
- If you are married**, your automatic benefit form is a joint-and-survivor annuity (D-G) with your spouse as beneficiary. You may choose that benefit form or, with your spouse's written consent, you may choose your plan's automatic benefit form for unmarried participants or any of the PBGC optional benefit forms, with your spouse or another person as beneficiary.
- Check the calculations, included in your benefit estimate package, that show the amount of your benefit under the Plan's Automatic Forms (options A and B) and the amount under PBGC's Optional Benefit forms (options C through J).

- Refer to our side-by-side comparison of all benefit forms by example in the [Summary of Examples Chart](#) [PDF].
- Read all information carefully as **you cannot change your benefit election after PBGC makes the first payment to you.**

Need more information for each benefit form?

Select **Description** to show or hide details that include examples based on a participant named Sam who is applying for a benefit.

- Sam will be age 65 when his benefit payments begin.
- He is married to Carol, who will be 61 years old when Sam's benefit payments begin.
- We show what Sam and Carol would receive under each benefit form, assuming Sam names Carol as his beneficiary.

Select the button next to benefit form you choose to elect.

Benefit Election Forms

A. Plan's Automatic Form for Unmarried participant [Description](#)

You may elect this automatic benefit or choose PBGC optional benefits forms C-J. The automatic benefit form in most plans is a straight-life annuity or a certain-and-continuous annuity.

- If you are married:
 - Your spouse has a legal right to the survivor benefit under your pension plan's automatic benefit form for married participants.
 - You can elect this benefit form or name a beneficiary other than your spouse **only** if your spouse consents by signing Section 4 of this application before a Notary Public.
 - What does it look like?** [View the Spousal Consent Example](#) [PDF].
 - How do I get it?** Your completed application, which includes section 4, will be available to print and save after you submit it online.

B. Plan's Automatic Form for Married participant [Description](#)

You may elect this automatic benefit with your spouse as beneficiary. Your spouse has a legal right to the survivor benefit under your pension plan's automatic benefit form for married participants. You may elect option (A) or any of the PBGC optional benefit forms (C-J) with your spouse or another person as beneficiary **only if**:

- Your spouse consents by signing Section 4 of this application before a Notary Public.
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My Plan Options

- [Get a Benefit Estimate](#)
- [Name Your Beneficiary](#)
- [Apply for Pension Benefits](#)
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1-800-400-7242

TTY/ASCI

Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

C. Straight Life Annuity [Description](#)

A straight-life annuity provides a fixed monthly benefit for the rest of your life only. No survivor benefit will be paid upon your death.

EXAMPLE: Sam elects a straight-life annuity, and he receives \$500 a month for the rest of his life. After Sam dies, Carol does not receive any benefits.

D. Joint-and-50% Survivor Annuity [Description](#)

A joint-and-survivor annuity provides a benefit for the rest of your life at an amount reduced from the straight-life annuity amount with 50% of that reduced amount to be paid to your beneficiary if you die before that person. If your beneficiary dies before you, your benefit will remain at the reduced level, and no survivor benefits will be payable when you die.

- The amount of your benefit will depend on the age of your beneficiary.
- You **cannot** change your beneficiary after PBGC makes your first payment.
- You may choose your spouse or someone else to be your beneficiary.
- If you are married:
 - Your spouse has a legal right to the survivor benefit under your pension plan's automatic benefit form for married participants.
 - You can elect this benefit form or name a beneficiary other than your spouse **only** if your spouse consents by signing Section 4 of this application before a Notary Public.
 - **What does it look like?** [View the Spousal Consent Example \[PDF\]](#).
 - **How do I get it?** Your completed application, which includes section 4, will be available to print and save after you submit it online.

EXAMPLE: Sam receives \$450 a month for the rest of his life. If Sam dies first, Carol receives \$225 a month for the rest of her life. If Carol dies first, Sam continues to receive \$450 a month for the rest of his life.

E. Joint-and-75% Survivor Annuity [Description](#)

A joint-and-survivor annuity provides a benefit for the rest of your life at an amount reduced from the straight-life annuity amount with 75% of that reduced amount to be paid to your beneficiary if you die before that person. If your beneficiary dies before you, your benefit will remain at the reduced level, and no survivor benefits will be payable when you die.

- The amount of your benefit will depend on the age of your beneficiary.
- You **cannot** change your beneficiary after PBGC makes your first payment.
- You may choose your spouse or someone else to be your beneficiary.
- If you are married:
 - Your spouse has a legal right to the survivor benefit under your pension plan's automatic benefit form for married participants.
 - You can elect this benefit form or name a beneficiary other than your spouse **only** if your spouse consents by signing Section 4 of this application before a Notary Public.
 - **What does it look like?** [View the Spousal Consent Example \[PDF\]](#).
 - **How do I get it?** Your completed application, which includes section 4, will be available to print and save after you submit it online.

EXAMPLE: Sam receives \$429 a month for the rest of his life. If Sam dies first, Carol receives \$322 a month for the rest of her life. If Carol dies first, Sam continues to receive \$429 a month for the rest of his life.

F. Joint-and-100% Survivor Annuity [Description](#)

A joint-and-survivor annuity provides a benefit for the rest of your life at an amount reduced from the straight-life annuity amount with 100% of that reduced amount to be paid to your beneficiary if you die before that person. If your beneficiary dies before you, your benefit will remain at the reduced level, and no survivor benefits will be payable when you die.

- The amount of your benefit will depend on the age of your beneficiary.
- You **cannot** change your beneficiary after PBGC makes your first payment.
- You may choose your spouse or someone else to be your beneficiary.
- If you are married:
 - Your spouse has a legal right to the survivor benefit under your pension plan's automatic benefit form for married participants.
 - You can elect this benefit form or name a beneficiary other than your spouse **only** if your spouse consents by signing Section 4 of this application before a Notary Public.
 - **What does it look like?** [View the Spousal Consent Example \[PDF\]](#).
 - **How do I get it?** Your completed application, which includes section 4, will be available to print and save after you submit it online.

EXAMPLE: Sam receives \$409 a month for the rest of his life. If Sam dies first, Carol receives \$409 a month for the rest of her life. If Carol dies first, Sam continues to receive \$409 a month for the rest of his life.

G. Joint-and-50% Survivor "Pop-up" Annuity [Description](#)

The "pop-up" annuity is the same as the joint-and-50% survivor annuity (D) except that if your beneficiary dies before you, your benefit "pops up" to the straight-life annuity amount.

- The amount of your benefit will depend on the age of your beneficiary.
- You **cannot** change your beneficiary after PBGC makes your first payment.
- You may choose your spouse or someone else to be your beneficiary.
- If you are married:
 - Your spouse has a legal right to the survivor benefit under your pension plan's automatic benefit form for married participants.
 - You can elect this benefit form or name a beneficiary other than your spouse **only** if your spouse consents by signing Section 4 of this application before a Notary Public.
 - **What does it look like?** [View the Spousal Consent Example \[PDF\]](#).
 - **How do I get it?** Your completed application, which includes section 4, will be available to print and save after you submit it online.

EXAMPLE: Sam elects a joint-and-50% survivor "pop-up" annuity and receives a payment of \$444 a month. If Sam dies first, Carol receives \$222 a month for the rest of her life. However, if Carol dies first, Sam's benefit "pops up" to his straight-life annuity benefit amount of \$500 a month for the rest of his life.

H. 5-year Certain-and-Continuous Annuity [Description](#)

H. 5-year Certain-and-Continuous Annuity [Description](#)

A 5-year certain-and-continuous annuity provides a benefit for the rest of your life at an amount reduced from the straight-life annuity amount. If you die within five years after your benefit payments start, your designated beneficiary will receive the benefit for the remainder of that "certain" period. If you die after the certain period, no survivor benefit is payable.

- The amount of your benefit is the same regardless of whom you designate as beneficiary.
- You **can** change this beneficiary at any time.
- If your beneficiary dies before you and before the end of the certain period, you should designate a new beneficiary.
- You may choose any beneficiary such as your spouse, another person, an estate, a trust, a church or other organization, etc.
- If you are married:
 - Your spouse has a legal right to the survivor benefit under your pension plan's automatic benefit form for married participants.
 - You can elect this benefit form or name a beneficiary other than your spouse **only** if your spouse consents by signing Section 4 of this application before a Notary Public.
 - **What does it look like?** [View the Spousal Consent Example](#) [PDF].
 - **How do I get it?** Your completed application, which includes section 4, will be available to print and save after you submit it online.

EXAMPLE: Sam receives \$494 a month for the rest of his life. If Sam dies within five years, Carol receives \$494 a month for the remainder of the five-year period. If Sam dies after 5 years, Carol does not receive any benefits.

I. 10-year Certain-and-Continuous Annuity [Description](#)

A 10-year certain-and-continuous annuity provides a benefit for the rest of your life at an amount reduced from the straight-life annuity amount. If you die within ten years after your benefit payments start, your designated beneficiary will receive the benefit for the remainder of that "certain" period. If you die after the certain period, no survivor benefit is payable.

- The amount of your benefit is the same regardless of whom you designate as beneficiary.
- You **can** change this beneficiary at any time.
- If your beneficiary dies before you and before the end of the certain period, you should designate a new beneficiary.
- You may choose any beneficiary such as your spouse, another person, an estate, a trust, a church or other organization, etc.
- If you are married:
 - Your spouse has a legal right to the survivor benefit under your pension plan's automatic benefit form for married participants.
 - You can elect this benefit form or name a beneficiary other than your spouse **only** if your spouse consents by signing Section 4 of this application before a Notary Public.
 - **What does it look like?** [View the Spousal Consent Example](#) [PDF].
 - **How do I get it?** Your completed application, which includes section 4, will be available to print and save after you submit it online.

EXAMPLE: Sam receives \$477 for the rest of his life. If Sam dies within ten years, Carol receives \$477 a month for the remainder of the ten-year period. If Sam dies after ten years, Carol does not receive any benefits.

J. 15-year Certain-and-Continuous Annuity [Description](#)

A 15-year certain-and-continuous annuity provides a benefit for the rest of your life at an amount reduced from the straight-life annuity amount. If you die within 15 years after your benefit payments start, your designated beneficiary will receive the benefit for the remainder of that "certain" period. If you die after the certain period, no survivor benefit is payable.

- The amount of your benefit is the same regardless of whom you designate as beneficiary.
- You **can** change this beneficiary at any time.
- If your beneficiary dies before you and before the end of the certain period, you should designate a new beneficiary.
- You may choose any beneficiary such as your spouse, another person, an estate, a trust, a church or other organization, etc.
- If you are married:
 - Your spouse has a legal right to the survivor benefit under your pension plan's automatic benefit form for married participants.
 - You can elect this benefit form or name a beneficiary other than your spouse **only** if your spouse consents by signing Section 4 of this application before a Notary Public.
 - **What does it look like?** [View the Spousal Consent Example](#) [PDF].
 - **How do I get it?** Your completed application, which includes section 4, will be available to print and save after you submit it online.

EXAMPLE: Sam receives \$452 a month for the rest of his life. If Sam dies within 15 years, Carol receives \$452 a month for the remainder of the 15-year period. If Sam dies after 15 years, Carol does not receive any benefits.

Double-check that the button to the left of your final choice is selected before continuing your application.

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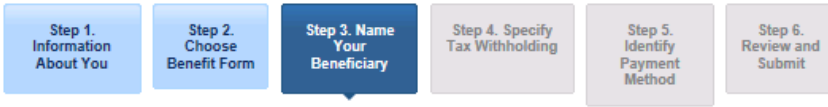
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My Profile

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Apply for Pension Benefits [700]

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Step 3. Name Your Beneficiary

You may choose a person or entity (such as a trust, church, estate or other organization) as your beneficiary. If you choose to name a person and they die before you, PBGC will pay the amount we owe you in this order: your spouse, your children, your parents, your estate, and your next of kin.

Beneficiary for Payments Owed at Death

PBGC may owe you payments at the time of your death. Generally, this will happen if your estimated benefit is too low. If your benefit will continue to be paid to another person after your death (as with a joint-and-survivor or certain-and-continuous annuity), the person receiving those continuing benefits will also receive any payments due to you at the time of your death. If there are no continuing benefits, PBGC will make any payments due to you at the time of your death to the person you designate in this section. If the beneficiary you name dies before you, PBGC will pay the amount we owe you in this order: your spouse, your children, your parents, your estate, and your next of kin.

#	Beneficiary	SSN	Date of Birth	Relationship	Percentage	
1	Beneficiary First and Last Name 123 Main Street anytown, ME 12345 555-555-4444	XXX-XX-4321	12/7/1982	Nephew		Edit Remove

[Add Additional Beneficiary](#)

My Plan Options

- [Get a Benefit Estimate](#)
- [Name Your Beneficiary](#)
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1-800-400-7242

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Step 1. Information About You

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Step 3. Name Your Beneficiary

Step 4. Specify Tax Withholding

Step 5. Identify Payment Method

Step 6. Review and Submit

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Step 4. Specify Tax Withholding

In general, tax laws require PBGC to withhold federal income tax from your pension payments, unless you specifically elect not to have taxes withheld.

Please read all options carefully and make your selection by **choosing one option - A, B, or C.** If you live outside the United States, you cannot choose Option A. You may change your option at any time online by selecting "Specify Tax Withholdings" under "My Plan Options".

When determining your federal tax withholding, you may find it helpful to read the IRS instructions for completing the IRS Form W-4P (Withholding Certificate for Pension or Annuity Payments). You can print a copy from the IRS website, www.irs.gov, under "Forms and Pubs". Or, call our Customer Contact Center and we will send you a copy.

If you live outside the United States, you may be eligible for special tax treatment under a tax treaty with the country where you reside. If applicable, we will send you additional information after submission.

A I elect not to have federal income tax withheld. (Available to U.S. residents only)

B I elect to have federal income tax withheld based on IRS instructions.

C I elect to have the following dollar amount of tax withheld for federal income tax.

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- [View Payment Dates](#)

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Step 5. Identify Payment Method

PBGC makes payments by way of **Electronic Funds Transfer (EFT)** either by Electronic Direct Deposit (EDD) or an Electronic Transfer Account (ETA), described below. EFT is safe, secure and convenient. You will get your payment on time even if you are out-of-town or unable to get to the bank.

If you **do not** have a bank account, you can open a low-cost Electronic Transfer Account (ETA) at a financial institution that offers such accounts. For more information about opening an ETA, call 1-888-382-3311 (toll-free) or visit the ETA website at www.eta-find.gov.

Note: PBGC does not process EFT for financial institutions outside of the United States and its territories. *If you live outside of the United States or its territories, PBGC will send your payment to your mailing address unless you have a bank account in the United States or its territories and provide the information below.*



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Financial Institution Information

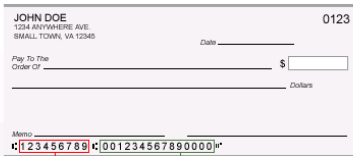
*** Bank Account Holder Name**

Participant Name

*** Bank Account Type**

Checking

Sample Check



Bank Routing Number
123456789

Bank Account Number
001234567890000

*** Bank Routing Number**

121042882 WELLS FARGO BANK NA

*** Bank Account Number**

1234567890

I would prefer that PBGC mail me a check instead of depositing the funds directly into my bank account

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- Step 1. Information About You
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Step 6. Review and Submit

1. Review Your Application

It is important that you review your application before submitting. You can make changes by selecting "Edit Section".

Step 1. Information About You [Edit Section](#)

Benefits Start Date	3/2014
Employment Status	Employed - Giant Food (Lanham, MD)
Court Order	No
Marital Status	Married
Date of Marriage	12/6/1999
Spouse's Name	Spouse First Name Spouse Middle Name Spouse Last Name
Beneficiary's Other Name(s) Used	None
Spouse's SSN	XXX-XX-6789
Spouse's Date of Birth	1/6/1939
Spouse's Gender	Male
Spouse's Email Address	Spouse@Spouse.com
Spouse's Daytime Phone Number	555-555-5555
Spouse's Evening Phone Number	555-555-5556

Step 2. Choose Benefit Form [Edit Section](#)



Customer Contact Center

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Email
mypension@pbgc.gov

You can email us any day, 24/7. We will acknowledge receipt and get back to you with an answer within three business days.

Or you can call us Monday-Friday, 8 a.m. - 7 p.m. ET (except federal holidays).

1-800-400-7242

TTY/ASCI
 Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

Step 3. Name Your Beneficiary

[Edit Section](#)

#	Beneficiary	SSN	Date of Birth	Relationship	Percentage
1	Beneficiary First and Last Name 123 Main Street anytown, ME 12345 555-555-4444	XXX-XX-4321	12/7/1962	Nephew	

Step 4. Specify Tax Withholding

[Edit Section](#)

Tax Withholding Option I elect not to have federal income tax withheld. (Available to U.S. residents only)

Step 5. Identify Payment Method

[Edit Section](#)

Bank Routing Number 121042882 (WELLS FARGO BANK NA)
Bank Account Number 1234567890
Bank Account Type Checking
Bank Account Holder Name Participant Name

2. Submit Your Application

In order to process your application, PBGC must have a copy of the following documents on file. If you have not already submitted copies of these documents to PBGC, you must do so before your application can be processed and your benefits can begin.

I have, or will, mail or fax a copy of the required proof documents to PBGC.

I, DOROTHY ASHCRAFT, understand that under the Government Paperwork Elimination Act (Title XVII of Public Law No. 105-277), selecting the "Submit" button will be deemed the equivalent of my handwritten signature and as binding under 18 U.S.C 1001 as a signature in ink.

Knowingly and willfully making false, fictitious, or fraudulent statements to PBGC is a crime punishable under Title 18, Section 1001, United States Code.

I declare under penalty of perjury that all of the information I have entered is true and correct.

I understand that I cannot change the form of benefit I have elected after PBGC makes my first payment.

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[Cancel](#)

[Submit](#)

PBGC Customer ID:
Last Login: 12/03/2015 at 10:25 AM

My Pension Plans ▾

My Profile

Messages

Your application has been submitted

PHOENIX STEEL CORP PEN PL PROD & MAIN CLAYMONT

Thank you for using MyPBA to apply for benefits for the PHOENIX STEEL CORP PEN PL PROD & MAIN CLAYMONT.

A confirmation email will be sent to you at mypbamodern@dpn.dev.pbgc.gov. If this email address is no longer active, please select the "My Profile" at the top of this page and update it now.

Proof Documents

Your application cannot be processed until you send the following proof documents to PBGC:

- Your birth or baptism certificate, or U.S. passport
- Your spouse's birth or baptism certificate, or U.S. passport
- Marriage certificate

To ensure accurate processing, print the MyPBA Cover sheet below and attach copies of your proof documents to send to PBGC. Make sure to write your PBGC Customer ID (16564) and Case Number (5146200) on all documents before faxing or mailing to:

Fax Number:
703-822-8792

Mailing Address:
Pension Benefit Guaranty Corporation
P.O. Box 151750
Alexandria, VA 22315-1750

Save and print your completed application for your records. Take care to save it securely on your computer or in your paper files. This application will not be available for later access on MyPBA.

[Print and Save your submitted application: MyPBA-ParticipantApplicationForBenefits-2015-12-07.pdf](#)

[Print a MyPBA Cover sheet to fax or mail proof documents](#)

Can't print your cover sheet? Make sure that your pop-up blocker is either disabled or set to allow pop-ups from PBGC.gov.

[Return](#)

Text Size: A A A

My Plan Options

- > [Get a Benefit Estimate](#)
- > [Name Your Beneficiary](#)
- > [Apply for Pension Benefits](#)
- > [View Payment Dates](#)



Customer Contact Center

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Email
my Pension@pbgc.gov

You can email us any day, 24/7. We will acknowledge receipt and get back to you with an answer within three business days.

Or you can call us Monday-Friday, 8 a.m. - 7 p.m. ET (except federal holidays).

1-800-400-7242

TTY/ASLII

Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

Form 705 – Apply for Pension Benefits

PBGC Customer ID: 998112

[My Pension Plan](#)

[My Profile](#)

[Messages](#)

Apply for Pension Benefits [705]

Text Size: [A](#) [A](#) [A](#)

How do I know if I can apply for pension benefits?

You must meet all of the following criteria:

1. You have not yet applied for benefits for this plan.
2. You have received a benefit estimate with an amount for each benefit form based on the date you want benefit payments to start (annuity date), and
3. You are eligible to begin receiving your retirement benefits, under the provisions of your pension plan, within the next 90 days.

If PBGC has approved your annuity start date that has already passed, you cannot apply online. Call 1-800-400-7242 to request a paper application form.

Please select the option below that applies to you:

Yes, I have received a benefit estimate or Optional Benefit Form letter for my annuity start date from PBGC.

What do I need to apply for pension benefits?

Be prepared so you can complete the entire application in one session. You cannot save your application online and for security purposes, your session will time out after 15 minutes of inactivity. This means you will be logged out and have to start over.

Take a minute to make sure:

- Adobe Acrobat is installed on your computer. If not, download it free from the [Adobe Web Site](#).
- Your computer is connected to a working printer.
- Spouse or other beneficiary information is handy (Social Security Number, date of birth, mailing address, and phone number).
- Your financial information for electronic direct deposit of your pension benefits is accurate.
- You can fax or postal mail copies of required proof document(s) necessary to complete your application process (list provided after completing application).
- If you are married, your spouse is able - if required, to sign the completed application in front of a notary.

No, I have not received a benefit estimate or Optional Benefit Form letter for my annuity start date from PBGC.

My Plan Options

- [Name Your Beneficiary](#)
- [Apply for Pension Benefits](#)
- [View Payment Dates](#)




Customer Contact Center

Got questions? Our Customer Contact Center is here to help.

 **Email**
mypension@pbgc.gov

You can email us any day, 24/7. We will acknowledge receipt and get back to you with an answer within three business days.

Or you can call us Monday-Friday, 8 a.m. - 7 p.m. ET (except federal holidays).

 **1-800-400-7242**

TTY/ASCI

Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

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[Cancel](#)

[Start Application](#)

PBGC Customer ID:

My Pension Plan

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Apply for Pension Benefits [705]

Text Size: A A A

- Step 1. Information About You**
- Step 2. Choose Benefit Form
- Step 3. Name Your Beneficiary
- Step 4. Specify Tax Withholding
- Step 5. Identify Payment Method
- Step 6. Review and Submit

My Plan Options

- > [Name Your Beneficiary](#)
- > [Apply for Pension Benefits](#)
- > [View Payment Dates](#)

Step 1. Information About You



Personal Information

Please review your personal information for accuracy. Call 1-800-400-7242 to make any corrections.

First and Last Name
Date of Birth
Social Security Number

Please review your contact information. To make changes, select the "My Profile" tab above. (Your Application for Benefits will not be saved.)

Mailing Address
Gender
Daytime Phone Number
Evening Phone Number
Your Email Address

Your relationship to plan participant

Plan Participant
Your Relationship to the Plan Participant
* Date of Participant's Death

Customer Contact Center

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Email
mypension@pbgc.gov

You can email us any day, 24/7. We will acknowledge receipt and get back to you with an answer within three business days.

Or you can call us Monday-Friday, 8 a.m. - 7 p.m. ET (except federal holidays).

1-800-400-7242

TTY/ASCII
Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

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[Cancel](#)

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PBGC Customer ID:

My Pension Plan

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Apply for Pension Benefits [705]

Text Size: A A A



My Plan Options

- > [Name Your Beneficiary](#)
- > [Apply for Pension Benefits](#)
- > [View Payment Dates](#)

Step 2. Choose Benefit Form

Your benefit form has already been selected and cannot be changed because you are either:

1. The beneficiary of a deceased participant who died after retirement; or
2. An alternate payee under a shared payment Qualified Domestic Relations Order (QDRO).

Please select the "Next" button to continue your application for benefits.

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[Cancel](#)

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Customer Contact Center

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mypension@pbgc.gov

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Or you can call us Monday-Friday, 8 a.m. - 7 p.m. ET (except federal holidays).

1-800-400-7242

TTY/ASCII

Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

PBGC Customer ID:

My Pension Plan

My Profile

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Apply for Pension Benefits [705]

Text Size: A A A

Step 1.
Information
About You

Step 2.
Choose
Benefit Form

Step 3. Name
Your
Beneficiary

Step 4. Specify
Tax Withholding

Step 5.
Identify
Payment
Method

Step 6.
Review and
Submit

My Plan Options

- > [Name Your Beneficiary](#)
- > [Apply for Pension Benefits](#)
- > [View Payment Dates](#)

Step 3. Name Your Beneficiary

You may choose a person or entity (such as a trust, church, estate or other organization) as your beneficiary. If you choose to name a person and they die before you, PBGC will pay the amount we owe you in this order: your spouse, your children, your parents, your estate, and your next of kin.



Name Your Beneficiary

PBGC may owe you payments at the time of your death. Generally, this will happen if your estimated benefit is too low. If your benefit will continue to be paid to another person after your death (as with a joint-and-survivor or certain-and-continuous annuity), the person receiving those continuing benefits will also receive any payments due to you at the time of your death. If there are no continuing benefits, PBGC will make any payments due to you at the time of your death to the person you designate in this section. If the beneficiary you name dies before you, PBGC will pay the amount we owe you in this order: your spouse, your children, your parents, your estate, and your next of kin.

#	Beneficiary	SSN	Date of Birth	Relationship	Percentage	
1	Beneficiary First and Last Name 555 Anystreet Anytown, WA 123456 555-555-5555	XXX-XX-8789	5/5/1928	Brother		Edit Remove

[Add Additional Beneficiary](#)

Customer Contact Center

Got questions? Our Customer Contact Center is here to help.

[Email
mypension@pbgc.gov](mailto:mypension@pbgc.gov)

You can email us any day, 24/7. We will acknowledge receipt and get back to you with an answer within three business days.

Or you can call us Monday-Friday, 8 a.m. - 7 p.m. ET (except federal holidays).

1-800-400-7242

TTY/ASCII
Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

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PBGC Customer ID:

My Pension Plan

My Profile

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Apply for Pension Benefits [705]

Text Size: A A A

Step 1. Information About You

Step 2. Choose Benefit Form

Step 3. Name Your Beneficiary

Step 4. Specify Tax Withholding

Step 5. Identify Payment Method

Step 6. Review and Submit

UMM INC AND SUBSIDIARIES PENSION PLAN FOR EES

Step 4. Specify Tax Withholding

In general, tax laws require PBGC to withhold federal income tax from your pension payments, unless you specifically elect not to have taxes withheld.

Please read all options carefully and make your selection by choosing one option - A, B, or C. If you live outside the United States, you cannot choose Option A. You may change your option at any time online by selecting "Specify Tax Withholdings" under "My Plan Options".

When determining your federal tax withholding, you may find it helpful to read the IRS instructions for completing the IRS Form W-4P (Withholding Certificate for Pension or Annuity Payments). You can print a copy from the IRS website, www.irs.gov, under "Forms and Pubs". Or, call our Customer Contact Center and we will send you a copy.

If you live outside the United States, you may be eligible for special tax treatment under a tax treaty with the country where you reside. If applicable, we will send you additional information after submission.

A I elect not to have federal income tax withheld. (Available to U.S. residents only)

B I elect to have federal income tax withheld based on IRS instructions.

C I elect to have the following dollar amount of tax withheld for federal income tax.

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My Plan Options

- [Name Your Beneficiary](#)
- [Apply for Pension Benefits](#)
- [View Payment Dates](#)



Customer Contact Center

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[Email mypension@pbgc.gov](mailto:mypension@pbgc.gov)

You can email us any day, 24/7. We will acknowledge receipt and get back to you with an answer within three business days.

Or you can call us Monday-Friday, 8 a.m. - 7 p.m. ET (except federal holidays).

[1-800-400-7242](tel:1-800-400-7242)

TTY/ASCII

Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

PBGC Customer ID: [Redacted]

My Pension Plan

My Profile

Messages

Apply for Pension Benefits [705]

Text Size: A A A

Step 1. Information About You

Step 2. Choose Benefit Form

Step 3. Name Your Beneficiary

Step 4. Specify Tax Withholding

Step 5. Identify Payment Method

Step 6. Review and Submit

My Plan Options

- > [Name Your Beneficiary](#)
- > [Apply for Pension Benefits](#)
- > [View Payment Dates](#) ^{td}



Step 5. Identify Payment Method

PBGC makes payments by way of Electronic Funds Transfer (EFT) either by Electronic Direct Deposit (EDD) or an Electronic Transfer Account (ETA), described below. EFT is safe, secure and convenient. You will get your payment on time even if you are out-of-town or unable to get to the bank.

If you **do not** have a bank account, you can open a low-cost Electronic Transfer Account (ETA) at a financial institution that offers such accounts. For more information about opening an ETA, call 1-888-382-3311 (toll-free) or visit the ETA website at www.eta-find.gov ^{td}.

Note: PBGC does not process EFT for financial institutions outside of the United States and its territories. *If you live outside of the United States or its territories, PBGC will send your payment to your mailing address unless you have a bank account in the United States or its territories and provide the information below.*

Customer Contact Center

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Email
mypension@pbgc.gov

You can email us any day, 24/7. We will acknowledge receipt and get back to you with an answer within three business days.

Or you can call us Monday-Friday, 8 a.m. - 7 p.m. ET (except federal holidays).

1-800-400-7242

TTY/ASCII
Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

Financial Institution Information

Bank Account Holder Name

PBGC Customer Name

Bank Account Type

Checking

Sample Check

JOHN DOE
1234 BRYANSGR AVE
SMALL TOWN, VA 12345 0123

Date: _____

Pay To The Order Of: _____ \$ _____ Dollars

MICR: ⑆123456789⑆ ⑆001234567890000⑆

Bank Routing Number
123456789

Bank Account Number
001234567890000

Bank Routing Number

061000104 SUNTRUST

Bank Account Number

1234567890

I would prefer that PBGC mail me a check instead of depositing the funds directly into my bank account

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PBGC Customer ID: [Redacted]

My Pension Plan

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Apply for Pension Benefits [705]

Text Size: A A A

- Step 1.
Information About You
- Step 2.
Choose Benefit Form
- Step 3. Name Your Beneficiary
- Step 4. Specify Tax Withholding
- Step 5. Identify Payment Method
- Step 6. Review and Submit

My Plan Options

- > [Name Your Beneficiary](#)
- > [Apply for Pension Benefits](#)
- > [View Payment Dates](#)



Step 6. Review and Submit

1. Review Your Application

It is important that you review your application before submitting. You can make changes by selecting "Edit Section".

Step 1. Information About You [Edit Section](#)

Plan Participant
Your Relationship to the Plan Participant
Date of Participant's Death

Step 2. Choose Benefit Form [Edit Section](#)

Benefit Form N/A

Step 3. Name Your Beneficiary [Edit Section](#)

#	Beneficiary	SSN	Date of Birth	Relationship	Percentage
1	Beneficiary First and Last Name 555 Anystreet Anytown, WA 123456 555-555-5555	XXX-XX-6789	5/5/1926	Brother	

Step 4. Specify Tax Withholding [Edit Section](#)

Tax Withholding Option I elect not to have federal income tax withheld. (Available to U.S. residents only)

Step 5. Identify Payment Method [Edit Section](#)

Bank Routing Number [Redacted]
Bank Account Number [Redacted]
Bank Account Type [Redacted]
Bank Account Holder Name [Redacted]

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1-800-400-7242

TTY/ASCII
Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

2. Submit Your Application

In order to process your application, PBGC must have a copy of the following documents on file. If you have not already submitted copies of these documents to PBGC, you must do so before your application can be processed and your benefits can begin.

I have, or will, mail or fax a copy of the required proof documents to PBGC.

I, _____, understand that under the Government Paperwork Elimination Act (Title XVII of Public Law No. 105-277), selecting the "Submit" button will be deemed the equivalent of my handwritten signature and as binding under 18 U.S.C 1001 as a signature in ink.

Knowingly and willfully making false, fictitious, or fraudulent statements to PBGC is a crime punishable under Title 18, Section 1001, United States Code.

I declare under penalty of perjury that all of the information I have entered is true and correct.

I understand that I cannot change the form of benefit I have elected after PBGC makes my first payment.

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[Cancel](#)

[Submit](#)

PBGC Customer ID: _____

[My Pension Plan](#)

[My Profile](#)

[Messages](#)

Your application has been submitted

Thank you for using MyPBA to apply for benefits for the

A confirmation email will be sent to you at mypbamodern@dpn.dev.pbgc.gov. If this email address is no longer active, please select the "My Profile" at the top of this page and update it now.

Proof Documents

Your application cannot be processed until you send the following proof documents to PBGC:

- Your birth or baptism certificate, or U.S. passport
- Death certificate for NEWTON PRIDEMORE

To ensure accurate processing, print the MyPBA Cover sheet below and attach copies of your proof documents to send to PBGC. Make sure to write your PBGC Customer ID (998112) and Case Number (16920800) on all documents before faxing or mailing to:

Fax Number:
703-822-8792

Mailing Address:
Pension Benefit Guaranty Corporation
P.O. Box 151750
Alexandria, VA 22315-1750

Save and print your completed application for your records. Take care to save it securely on your computer or in your paper files. This application will not be available for later access on MyPBA.

[Print and Save your submitted application: MyPBA-BeneficiaryApplicationForBenefits-2015-12-10.pdf](#)

[Print a MyPBA Cover sheet to fax or mail proof documents](#)

Can't print your cover sheet? Make sure that your pop-up blocker is either disabled or set to allow pop-ups from PBGC.gov.

[Return](#)

Text Size: [A](#) [A](#) [A](#)

My Plan Options

- [Name Your Beneficiary](#)
- [Apply for Pension Benefits](#)
- [View Payment Dates](#)



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1-800-400-7242

TTY/ASCII
Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

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[Privacy Policy](#) | [Disclaimer](#)

Form 707 - Designation of Beneficiary for Benefits Owed at Death



[Help](#) | [Log Out](#)

PBGC Customer ID:
Last Login: 12/03/2015 at 10:25 AM

[My Pension Plans](#) ▾

[My Profile](#)

[Messages](#)

Name Your Beneficiary

PHOENIX STEEL CORPORATION SALARIED

Why do I need to designate a beneficiary?

PBGC may owe you money at the time of your death. Typically, this happens if your final benefit is higher than the estimated benefit we had been paying. If another person continues to receive your benefit after your death (as with a joint-and-survivor or certain-and-continuous annuity), PBGC will pay any money owed to that person. If there are no continuing benefits or the person designated to receive continuing benefits dies before you, PBGC will pay any money owed you at the time of your death to the person(s) and/or entity(ies) (such as a trust, church, estate or other organization) that you designate in this section. If you do not make a designation, or if the beneficiary is a person and dies before you, PBGC will pay the money in this order to: your spouse, your children, your parents, your estate, or your next of kin.

Don't remember if you have named a beneficiary? Send us an email at MyPension@pbgc.gov, and ask us to look it up. Please include your full name, PBGC case number, last four digits of your Social Security Number, and a phone number where we can reach you. Or call us at 1-800-400-7242, Monday through Friday, 8:00 a.m.-7:00 p.m. ET.

I name the following as my beneficiary(ies). This designation replaces any previous designation and will be effective only when PBGC receives it.

#	Beneficiary	SSN	Date of Birth	Relationship	Percentage	
1	Beneficiary First and Last Name 555 Lancaster Raleigh, NV 55555 555-555-5555	XXX-XX-6789	7/7/1977	Son		Edit Remove

[Add Additional Beneficiary](#)

I, _____ understand that under the Government Paperwork Elimination Act (Title XVII of Public Law No. 105-277), selecting the "Submit" button will be deemed the equivalent of my handwritten signature and as binding under 18 U.S.C 1001 as a signature in ink.

Knowingly and willfully making false, fictitious, or fraudulent statements to PBGC is a crime punishable under Title 18, Section 1001, United States Code.

I declare under penalty of perjury that all of the information I have entered is true and correct.

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[Submit](#)

Text Size: [A](#) [A](#) [A](#)

My Plan Options

- [Name Your Beneficiary](#)
- [Provide Direct Deposit \(EDD\) Information](#)
- [Specify Federal Tax Withholdings](#)
- [Your Benefit Payment History](#)
- [Your Tax Forms](#)
- [Income Verification Letter](#)
- [View Payment Dates](#)



Customer Contact Center

Got questions? Our Customer Contact Center is here to help.

[Email](mailto:mypension@pbgc.gov)
mypension@pbgc.gov

You can email us any day, 24/7. We will acknowledge receipt and get back to you with an answer within three business days.

Or you can call us Monday-Friday, 8 a.m. - 7 p.m. ET (except federal holidays).

[1-800-400-7242](tel:1-800-400-7242)

TTY/ASCI

Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

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[Privacy Policy](#) | [Disclaimer](#)

Form 708 - Designation of Beneficiary

PBGC Customer ID:
Last Login: 12/03/2015 at 10:25 AM

[My Pension Plans](#) ▾

[My Profile](#)

[Messages](#)

Name Your Beneficiary

PHOENIX STEEL CORP PEN PL PROD & MAIN CLAYMONT

Why do I need to designate a beneficiary?

If there are payments owed to you at the time of your death, PBGC will pay them to the person(s) and/or entity(ies) (such as a trust, church, estate or other organization) that you designate below. If you do not make a designation, or if the beneficiary is a person and dies before you, PBGC will pay any money we owe you in this order to: your spouse, your children, your parents, your estate, or your next of kin.

Don't remember if you have named a beneficiary? Send us an email at MyPension@pbgc.gov, and ask us to look it up. Please include your full name, PBGC case number, last four digits of your Social Security Number, and a phone number where we can reach you. Or call us at 1-800-400-7242, Monday through Friday, 8:00 a.m.-7:00 p.m. ET.

I name the following as my beneficiary(ies). **This designation replaces any previous designation and will be effective only when PBGC receives it.**

#	Beneficiary	SSN	Date of Birth	Relationship	Percentage	
1	Beneficiary First and Last Name* 456 Main Street Hometown, MA 54321 555-555-5557	XXX-XX-8789	1/15/1945	Neighbor		Edit Remove

 [Add Additional Beneficiary](#)

I, _____, understand that under the Government Paperwork Elimination Act (Title XVII of Public Law No. 105-277), selecting the "Submit" button will be deemed the equivalent of my handwritten signature and as binding under 18 U.S.C 1001 as a signature in ink.

Knowingly and willfully making false, fictitious, or fraudulent statements to PBGC is a crime punishable under Title 18, Section 1001, United States Code.

I declare under penalty of perjury that all of the information I have entered is true and correct.

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[Cancel](#)

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Text Size: [A](#) [A](#) [A](#)


My Plan Options

- [Get a Benefit Estimate](#)
- [Name Your Beneficiary](#)
- [Apply for Pension Benefits](#)
- [View Payment Dates](#)




Customer Contact Center

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 **Email**
mypension@pbgc.gov

You can email us any day, 24/7. We will acknowledge receipt and get back to you with an answer within three business days.

Or you can call us Monday-Friday, 8 a.m. - 7 p.m. ET (except federal holidays).

 **1-800-400-7242**

TTY/ASCI
Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

Form 711 - Change of Beneficiary for Certain & Continuous (C&C) Benefits Only



[Help](#) | [Log Out](#)

PBGC Customer ID: [redacted]
Last Login: 04/29/2005 at 08:37 AM

[My Pension Plan](#)

[My Profile](#)

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Name Your Beneficiary

Text Size: [A](#) [A](#) [A](#)

Why do I need to designate a beneficiary?

If you are receiving a Certain & Continuous annuity, you may change your beneficiary(ies). If you die before the certain period ends, any remaining payments will go to the person(s) or entity(ies) (such as a trust, church, estate or other organization) that you designate. If you do not make a designation, or if the beneficiary is a person and dies before you, PBGC will pay the amount we owe in this order to: your spouse, your children, your parents, your estate, or your next of kin.

Don't remember if you have named a beneficiary? Send us an email at MyPension@pbgc.gov, and ask us to look it up. Please include your full name, PBGC case number, last four digits of your Social Security Number, and a phone number where we can reach you. Or call us at 1-800-400-7242, Monday through Friday, 8:00 a.m.-7:00 p.m. ET.

My Plan Options

- [Change Your Beneficiary](#)
- [Provide Direct Deposit \(EDD\) Information](#)
- [Specify Federal Tax Withholdings](#)
- [Your Benefit Payment History](#)
- [Your Tax Forms](#)
- [Income Verification Letter](#)
- [View Payment Dates](#)

#	Beneficiary	SSN	Date of Birth	Relationship	Percentage	
1	Walt Disney 123 Main Street Magic Kingdom, FL 12345 555-555-5555	XXX-XX-6789	1/18/1907	Grandfather		Edit Remove

[Add Additional Beneficiary](#)

I, MANUEL AGRONT, understand that under the Government Paperwork Elimination Act (Title XVII of Public Law No. 105-277), selecting the "Submit" button will be deemed the equivalent of my handwritten signature and as binding under 18 U.S.C 1001 as a signature in ink.

Knowingly and willfully making false, fictitious, or fraudulent statements to PBGC is a crime punishable under Title 18, Section 1001, United States Code.

I declare under penalty of perjury that all of the information I have entered is true and correct.

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Customer Contact Center

Got questions? Our Customer Contact Center is here to help.

[Email
mypension@pbgc.gov](mailto:mypension@pbgc.gov)

You can email us any day, 24/7. We will acknowledge receipt and get back to you with an answer within three business days.

Or you can call us Monday-Friday, 8 a.m. - 7 p.m. ET (except federal holidays).

[1-800-400-7242](tel:1-800-400-7242)

TTY/ASCII

Call 1-800-877-8339 and ask to be connected to 1-800-400-7242.

Form 716A – Certification of Pension Plan Disability Status

PBGC Customer ID:
Last Login: 12/10/2015 at 04:03 PM

My Pension Plan

My Profile

Messages

Certification of Pension Plan Disability Status

Text Size: A A A

RETIREMENT PLAN OF CIRCUIT CITY STORES, INC.

PBGC needs your certification to determine whether to continue paying your current benefit amount. If you have questions, call our Customer Contact Center at 1-800-400-7242.

Information About You

Please review your personal information for accuracy. Call 1-800-400-7242 to make any corrections.

First and Last Name
Date of Birth
Social Security Number

Please review your contact information. Select "Update Contact Information" to make any changes.

Mailing Address
Gender
Daytime Phone Number
Evening Phone Number
Your Email Address

Update Contact Information

My Plan Options

- Name Your Beneficiary
Provide Direct Deposit (EDD) Information
Specify Federal Tax Withholdings
Your Benefit Payment History
Your Tax Forms
Income Verification Letter
Certify Disability Status
View Payment Dates

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Email
mypension@pbgc.gov

Certification

Select the option below that describes your current disability status.

- A Yes, I certify that I am still disabled as previously determined under my pension plan
B No, I certify that I am no longer disabled as previously determined under my pension plan

* Effective Date No Longer Disabled

Text input field for effective date

I understand that in the future I may be required to provide supporting documentation.

I understand that under the Government Paperwork Elimination Act (Title XVII of Public Law No. 105-277), selecting the "Submit" button will be deemed the equivalent of my handwritten signature and as binding under 18 U.S.C 1001 as a signature in ink.

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