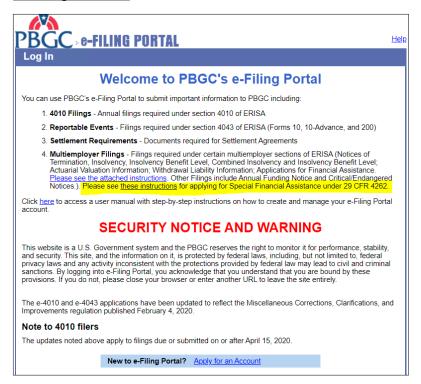# PBGC's E-filing Portal for Special Financial Assistance

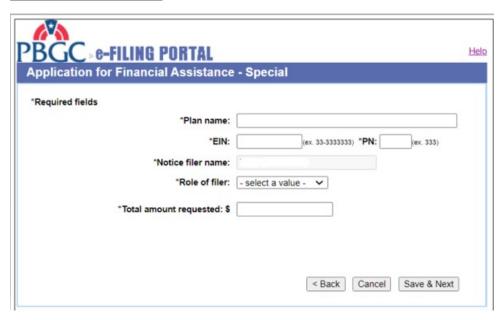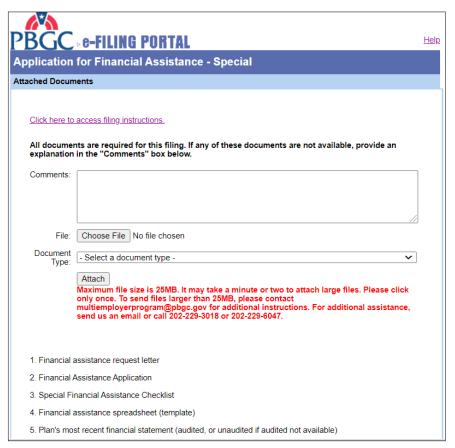Main Log in Screen:

Screen to Select Filing Type after plan administrator selects "Create New Filing" after logging in:

Basic Information Screen:

Document Uploading Page (partial – the full list of document types is shown in following screen shot, next page):

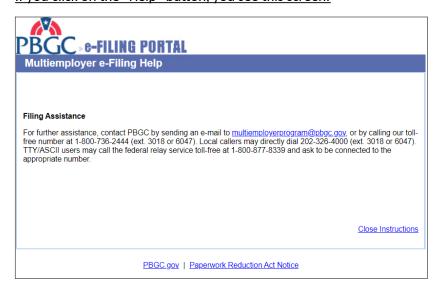## List of Document Types:

1. Financial assistance request letter

2. Financial Assistance Application

3. Special Financial Assistance Checklist

4. Financial assistance spreadsheet (template)

5. Plan's most recent financial statement (audited, or unaudited if audited not available)

6. List of all cash and investment accounts maintained for the plan

7. Bank/Asset statements for all cash and investment accounts

8. Rehabilitation plan (or funding improvement plan, if applicable)

9. Zone certification

10. Benefit calculations and supporting data (i.e. accrued benefit, years of service, and etc.)

11. Pension plan documents, all versions available, and all amendments signed and dated

12. Contributing Employers

13. Participant database

14. Latest annual return/report of employee benefit plan (Form 5500)

15. Most recent actuarial valuation for the plan

16. Projections for special financial assistance (estimated income, benefit payments and expenses)

17. Historical Plan Financial Information (CBUs, contribution rates, contribution amounts, withdrawal liability payments)

18. Other

[< Back] [Cancel] [Save & Next]

If you click on the "Help" button, you see this screen:

PBGC · e-FILING PORTAL

Multiemployer e-Filing Help

Filing Assistance

For further assistance, contact PBGC by sending an e-mail to multiemployerprogram@pbgc.gov, or by calling our toll-free number at 1-800-736-2444 (ext. 3018 or 6047). Local callers may directly dial 202-326-4000 (ext. 3018 or 6047). TTY/ASCII users may call the federal relay service toll-free at 1-800-877-8339 and ask to be connected to the appropriate number.

Close Instructions

PBGC.gov | Paperwork Reduction Act Notice

When the PBGC is not accepting applications, the radio button for Special Financial Assistance will not be visible:

And people won't be able to Edit filings that are in process (Edit Filing button is hidden; (this is the view plan administrators see when they first log in):