

v20220701p

**Version Updates**

Version

Date updated

v20220701p

7/1/2022

**TEMPLATE 1**

File name: *Template 1 Plan Name*, where "Plan Name" is an abbreviated version of the plan name.

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**Form 5500 Projection**

For an additional submission due to merger under § 4262.4(f)(1)(ii): *Template 1 Plan Name Merged*, where "Plan Name Merged" is an abbreviated version of the plan name for the separate plan involved in the merger.

For the 2018 plan year until the most recent plan year for which the Form 5500 is required to be filed by the filing date of the initial application, provide the projection of expected benefit payments as required to be attached to the Form 5500 Schedule MB if the response to line 8b(1) of the Form 5500 Schedule MB should be "Yes."

**PLAN INFORMATION**

|                        |  |
|------------------------|--|
| Abbreviated Plan Name: |  |
| EIN:                   |  |
| PN:                    |  |

Complete for each Form 5500 that has been filed prior to the date the SFA application is submitted\*.

|                      | 2018 Form 5500            | 2019 Form 5500 | 2020 Form 5500 | 2021 Form 5500 | 2022 Form 5500 | 2023 Form 5500 | 2024 Form 5500 | 2025 Form 5500 |
|----------------------|---------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Plan Year Start Date |                           |                |                |                |                |                |                |                |
| Plan Year End Date   |                           |                |                |                |                |                |                |                |
| Plan Year            | Expected Benefit Payments |                |                |                |                |                |                |                |
| 2018                 |                           | N/A            | N/A            | N/A            | N/A            | N/A            | N/A            | N/A            |
| 2019                 |                           |                | N/A            | N/A            | N/A            | N/A            | N/A            | N/A            |
| 2020                 |                           |                |                | N/A            | N/A            | N/A            | N/A            | N/A            |
| 2021                 |                           |                |                |                | N/A            | N/A            | N/A            | N/A            |
| 2022                 |                           |                |                |                |                | N/A            | N/A            | N/A            |
| 2023                 |                           |                |                |                |                |                | N/A            | N/A            |
| 2024                 |                           |                |                |                |                |                |                | N/A            |
| 2025                 |                           |                |                |                |                |                |                |                |
| 2026                 |                           |                |                |                |                |                |                |                |
| 2027                 |                           |                |                |                |                |                |                |                |
| 2028                 | N/A                       |                |                |                |                |                |                |                |
| 2029                 | N/A                       | N/A            |                |                |                |                |                |                |
| 2030                 | N/A                       | N/A            | N/A            |                |                |                |                |                |
| 2031                 | N/A                       | N/A            | N/A            | N/A            |                |                |                |                |
| 2032                 | N/A                       | N/A            | N/A            | N/A            | N/A            |                |                |                |
| 2033                 | N/A                       | N/A            | N/A            | N/A            | N/A            | N/A            |                |                |
| 2034                 | N/A                       | N/A            | N/A            | N/A            | N/A            | N/A            | N/A            |                |

\* Adjust column headers as may be needed due to any changes in the plan year since 2018 and provide supporting explanation. For example, assume the plan has a calendar year plan year, but effective 10/1/2019 the plan year is changed to begin on October 1. For 2019 there will be two 2019 Forms - one for the short plan year from 1/1/2019 to 9/30/2019, and another for the plan year 10/1/2019 to 9/30/2020. For this example, modify the table to show a separate column for each of the separate Forms 5500, and identify the plan year period for each filing.