

# SFA Request EFP Screenshots



- Single-Employer Filings Dashboard
- Multiemployer Filings Dashboard
- New Filing**
- User Guide
- Settings
- Logout

New Filing

Type of Pension Plan

Filing Type

Form Type

Filing Reason


Prepopulate Form

Filing Created

## Type of Pension Plan

\* Required

  
Multiemployer

  
Single-Employer

Next



- Single-Employer Filings Dashboard
- Multiemployer Filings Dashboard
- New Filing**
- User Guide
- Settings
- Logout

New Filing

Type of Pension Plan

Filing Type

Form Type

Filing Reason

Prepopulate Form

Filing Created

## What type of filing are you submitting?

\* Required

- Financial Assistance
- Funding Notice
- Insolvency Notice
- SFA Annual Compliance
- Special Financial Assistance Request (SFA)
- Termination Notice

Previous

Next



- Single-Employer Filings Dashboard
- Multiemployer Filings Dashboard
- New Filing**
- User Guide
- Settings
- Logout



Would you like to start a new filing or pre-populate from a previous filing?

\* Required

- Start new
- Pre-populate from previous filing

[Previous](#) [Next](#)



- Single-Employer Filings Dashboard
- Multiemployer Filings Dashboard
- New Filing**
- User Guide
- Settings
- Logout



Your draft filing has been created.

This filing will be visible in the draft filings section of your dashboard. To complete this filing, click "Continue Filing" below.

[Create New](#) [Continue Filing](#)

## Section A - Plan Identifying Information



- Single-Employer Filings Dashboard
- Multiemployer Filings Dashboard
- New Filing
- User Guide
- Settings
- Logout

SFA Request ( Filing ID - 710022955, Type - Special Financial Assistance Request (SFA) )

Section A - Plan Identifying Information | Section B - Plan Documents | Section C - Plan Data | Section D - Plan Statements | Section E - Checklist, certifications, and SFA-related plan amendments | Review & Submit | Confirmation

### Plan Details

Plan Name

EIN

PN

Notice Filer Name

Role of Filer

Total Amount Requested  
Note: This figure should match the amount reported in Section E, item 5.  
\$

[Save & Next](#)

#### Instructions/Need Help?

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For questions related to SFA Annual Compliance Filings, contact [multiemployerprogram@pbgc.gov](mailto:multiemployerprogram@pbgc.gov).

**Note:**

- Fields marked with \* are required to proceed further

## Section B - Plan Documents



- Single-Employer Filings Dashboard
- Multiemployer Filings Dashboard
- New Filing
- User Guide
- Settings
- Logout

SFA Request ( Filing ID - 710022955, Type - Special Financial Assistance Request (SFA) )

Section A - Plan Identifying Information | Section B - Plan Documents | Section C - Plan Data | Section D - Plan Statements | Section E - Checklist, certifications, and SFA-related plan amendments | Review & Submit | Confirmation

### Plan Documents

Please upload documents to this section in accordance with the [General Instructions for Multiemployer Plans Applying for Special Financial Assistance](#).

(1) Plan documentation

- Most recent plan document or restatement of the plan document and all amendments adopted since the last restatement (if any).
- Most recent trust agreement or restatement of the trust agreement and all amendments adopted since the last restatement (if any).
- Most recent trust agreement or restatement of the trust agreement and all amendments adopted since the last restatement (if any).
- Most recent IRS determination letter.

(2) Actuarial valuation reports.

(3) Rehabilitation plan or funding improvement plan.

(4) Form 5500.

(5) Zone Certifications.

(6) Account statements.

(7) Plan's financial statement.

(8) Withdrawal liability documentation.


(9) Death Audit and Census Data.

(10) Automated Clearing House (ACH) Vendor/Miscellaneous Payment Enrollment Form and required notarized bank letter.

#### Attachments

File Name	Document Type	Description	Date Created
There are no records to display.			

Drag and drop to upload



[or click to browse](#)

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[PBGC.gov](#) | [Paperwork Reduction Act Notice](#)

## Section C - Plan Data

**SFA Request ( Filing ID - 710022955, Type - Special Financial Assistance Request (SFA) )**

Section A - Plan Identifying Information | Section B - Plan Documents | **Section C - Plan Data** | Section D - Plan Statements | Section E - Checklist, certifications, and SFA-related plan amendments | Review & Submit | Confirmation

### Plan Data

Please upload documents to this section in accordance with the General Instructions for Multiemployer Plans Applying for Special Financial Assistance.

- (1) Form 5500 projection.
- (2) Contributing employers.
- (3) Historical plan information.
- (4) SFA determination.
- (5) Baseline details.
- (6) Reconciliation details.
- (7) Assumption/method changes.
- (8) Contributions and withdrawal liability details.
- (9) Participant data.
- (10) Assumption summaries.

**Attachments**

File Name	Document Type	Description	Date Created ↓
There are no records to display.			

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or click to browse

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## Section D - Plan Statements

**SFA Request ( Filing ID - 710022955, Type - Special Financial Assistance Request (SFA) )**

Section A - Plan Identifying Information | Section B - Plan Documents | Section C - Plan Data | **Section D - Plan Statements** | Section E - Checklist, certifications, and SFA-related plan amendments | Review & Submit | Confirmation

### Plan Statements

Please upload documents to this section in accordance with the General Instructions for Multiemployer Plans Applying for Special Financial Assistance.

**Attachments**

File Name	Document Type	Description	Date Created ↓
There are no records to display.			

Drag and drop to upload  
or click to browse

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# Section E – Checklist, certifications, and SFA-related plan amendments



- Single-Employer Filings Dashboard
- Multemployer Filings Dashboard
- New Filing
- User Guide
- Settings
- Logout

SFA Request ( Filing ID - 710022955, Type - Special Financial Assistance Request (SFA) )



## Checklist, Certifications, and SFA-Related Plan Amendments

Please upload documents to this section in accordance with the General Instructions for Multiemployer Plans Applying for Special Financial Assistance.

- (1) SFA Application Checklist
- (2) SFA Eligibility Certification and Supporting Information for Critical and Declining Plan.
- (3) SFA Eligibility Certification and Supporting Information for Critical Plan.
- (4) Priority Status.
- (5) SFA Amount Certification.
- (6) Fair Market Value Certification.
- (7) Executed Plan Amendment for SFA Compliance.
- (8) Proposed Plan Amendment to Reinstate Benefits.
- (9) Executed Plan Amendment to Reversed Partition Order.
- (10) Penalty of Perjury Statement.

### Attachments

File Name	Document Type	Description	Date Created
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There are no records to display.

Drag and drop to upload



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Previous **Save & Next**

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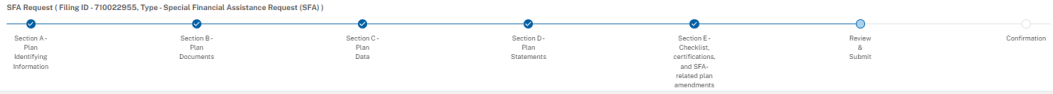
#### Note

\* Fields marked with \* are required to proceed further

# Review & Submit



- [Single-Employer Filings Dashboard](#)
- [Multiemployer Filings Dashboard](#)
- [New Filing](#)
- [User Guide](#)
- [Settings](#)
- [Logout](#)



## Review & Submit

**Filing Held By**  
Erika Solberg  
**Email Address**  
solberg.erika@pbgc.gov

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For questions related to SFA Applications, contact [multiemployerprogram@pbgc.gov](mailto:multiemployerprogram@pbgc.gov)

**Note:**

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### Filing Details

#### Plan Identifying Information

**Plan Name \***  
Text

**EIN \***  
11111111

**PN \***  
001

**Notice Filer Name \***  
Test Filer

**Role of Filer \***  
Trustee

**Total Amount Requested \***  
\$ 5,000,000.00

#### Attachments

File Name	Document Type	Description	Date Created	Related to
TEST_EXCEL.xlsx	Penalty of Perjury Statement	test	02/16/2024 1:06 PM	Checklist Certifications
TEST.docx	Plan Statements	test	02/16/2024 1:06 PM	Plan Statements
TEST.docx	Form 5500 Projection	test 5500	02/16/2024 1:05 PM	Plan Data
TEST.docx	Actuarial valuation report for the 2018 plan year and each subsequent actuarial valuation report completed before the application filing date.	test	02/16/2024 1:03 PM	Plan Documents

[Previous](#) [Submit](#)