

Contents

Form 700 – Request Calculation.....	2
Form 700 – Apply for Benefits.....	9
Form 701 – Payee Information.....	24
Form 707 – Designation of Beneficiary for Benefits Owed at Death (Receiving Benefits)	27
Form 708 – Designation of Beneficiary (Not Currently Receiving Benefits)	33
Form 710 – Application for Electronic Direct Deposit.....	36

Form 700 – Request Calculation

To apply for benefits online, a user must have a benefit calculation in MyPBA. The calculation selected will be used got into pay.

Request a benefit calculation

1. Information review ✓
2. Retirement selection ✓
3. Choose surviving beneficiary ✓
4. Review & submit 🔄

Information review

1) Is your information still current?

Full name
VNVBS DFUOAJ [Edit Information](#)

Date of birth
05/25/1959

SSN or ITIN (without dashes) Type of ID
2517 SSN

Marital status
Married

2) Is your spouse's information correct?

Full name (of spouse)
QOLPU DFUOAJ [Edit Information](#)

Date of birth (of spouse)
08/07/1959

3) Is there a court order that gives another person the right to receive part of your benefit?

No Yes

[Return to My Plans](#) [Save & Continue](#)

Request a benefit calculation

Get an estimate for the amount of benefit on the date you may want to start it.

- 1. Information review ✓
- 2. Retirement selection ●
- 3. Choose surviving beneficiary
- 4. Review & submit

Retirement selection

You can only have one open calculation request per pension plan role at a time. If you are currently waiting on a calculation, you will not be able to request an additional calculation for the same pension plan role until you have received your prior request...

1) Which pension plan do you need a calculation for?

Selected Plan * Required

2) When are you interested in starting your benefit?

Your benefit is calculated based on the date you select to start your benefit (benefit start date). Use the information below to help you choose a date. You may select up to five dates for requested calculations. If you are eligible for an Early Unreduced Retirement Date, we will automatically calculate your benefit amount for that date in addition to the date(s) you choose below. The dates you select must be the 1st of the month, and between your First Eligible Date and your Required Beginning Date. If your Required Beginning Date has passed, you must select that date.

First Eligible Date

June 1, 2024

This is the earliest date you can start your benefit in this plan.

Normal Retirement Date

June 1, 2024

This is your normal date of retirement within this plan.

Required Beginning Date

April 1, 2033

This is the latest date you can start your benefit in this plan.

Retirement date option 1 * Required

06/01/2024

Retirement date option 2

MM/DD/YYYY

Retirement date option 3

MM/DD/YYYY

Retirement date option 4

MM/DD/YYYY

Retirement date option 5

MM/DD/YYYY

Back

Save & Continue

Request a benefit calculation

Get an estimate for the amount of benefit on the date you may want to start it.

1. Information review ✓
2. Retirement selection ✓
3. Choose surviving beneficiary ③
4. Review & submit

Choose surviving beneficiary

Your surviving beneficiary will receive any continuing annuity payments from your plan and any other money owed to you at the time of your death. Your benefit is calculated using the age of your surviving beneficiary. Depending on the benefit option you choose later, you may not be able to change your surviving beneficiary after you start to receive your benefit. Please choose carefully.

When you are ready to apply for benefits, if you are married and choose a surviving beneficiary that is not your spouse, you will need to download and return to PBGC a completed and notarized Spousal Consent Form.

Surviving beneficiaries to calculate

Full Name	Relationship	
QOLPU DFUOAJ	Spouse	Edit

[Modify beneficiary selections](#)

[Back](#)

[Save & Continue](#)

Request a benefit calculation

Get an estimate for the amount of benefit on the date you may want to start it.

1. Information review ✓
2. Retirement selection ✓
3. Choose surviving beneficiary ③
4. Review & submit

Choose surviving beneficiary

Your surviving beneficiary will receive any continuing annuity payments from your plan and any other money owed to you at the time of your death. Your benefit is calculated using the age of your surviving beneficiary. Depending on the benefit option you choose later, you may not be able to change your surviving beneficiary after you start to receive your benefit. Please choose carefully.

You may choose up to three beneficiaries to receive estimates for.

1) Select the first individual you would like to receive a calculation for. * Required

DFUOAJ, QOLPU R

2) Select a second individual you would like to receive a calculation for.

3) Select a third individual you would like to receive a calculation for.

Or

[Add a New Contact](#)

[Back](#)

[Save & Continue](#)

If the user wants to add a new contact as a beneficiary, he will have to enter the following information - screen 1 of 2 (user must scroll down)

Request a benefit calculation

Get an estimate for the amount of benefit on the date you may want to start it.

1. Information review ✓
2. Retirement selection ✓
3. Choose surviving beneficiary ✓
4. Review & submit 🕒

Choosing surviving beneficiary

Your surviving beneficiary will receive any continuing annuity payments from your plan and any other money owed to you at the time of your death. Your benefit is calculated using the age of your surviving beneficiary. Depending on the benefit option you choose later, you may not be able to change your surviving beneficiary after you start to receive your benefit. Please choose carefully.

1)) Who do you want to name as a your surviving beneficiary?

Adding a new contact

[Select a different contact >](#)

2) Are your surviving beneficiary's details correct?

Beneficiary's first name * Required

Beneficiary's last name * Required

Beneficiary's relationship to you * Required

Beneficiary's birthday * Required

Beneficiary's contact information

Beneficiary's email * Required

Beneficiary's mobile phone number * Required

Beneficiary's other phone number

Beneficiary's other phone extension

Mail address same as contact?

No Yes

Mailing address

Address line 1

Address line 2

Address line 3

City

Country

State/Province

Zip/postal code

Save & Continue

Review & Submit – screen 1 of 3 (user must scroll down)

Request a benefit calculation

Get an estimate for the amount of benefit on the date you may want to start it.

1. Information review ✓
2. Retirement selection ✓
3. Choose surviving beneficiary ✓
4. Review & submit 🕒

Review your information

You are almost done! Make sure your information is correct, and then click the "Submit" button.

Information review

Edit

Full name
VNVBS DFUOAJ

Date of birth
05/25/1959

SSN or ITIN (without dashes)
2517

Type of ID
SSN

Marital status
Married

Your spouse's information

Full name (of spouse)
QOLPU DFUOAJ

Date of birth (of spouse)
08/07/1959

Review & Submit – screen 2 of 3 (user must scroll down)

Retirement selection

Edit

Pension plan
[REDACTED]

I request an estimate(s) for a benefit to start on:

Retirement date option 1
June 1, 2024

Retirement date option 2
July 1, 2024

Retirement date option 3
November 1, 2026

Retirement date option 4

Retirement date option 5

Legal information

Are there any legal matters involved?
No

Your surviving beneficiary

Edit

Name
QOLPU DFUOAJ

Relationship
Spouse

Birthday
08/07/1959

Email
mask@pbgc.gov

Mobile phone
[REDACTED]

Other phone

Other phone extension

Mailing Address
[REDACTED]

Apply for benefits

For the application process, you may be asked to send:

- **Your proof of marriage**
Please send a copy of your marriage certificate.
- **Spousal Consent Form**
Included in the Benefit Application form.
- **Proof of Spouse's Age**
This can be a photo of their birth or baptism certificate, or their U.S. passport.

You can mail the documents at any time to:

PBGC
PO Box 151750
Alexandria, VA 22315-1750

Submit

Form 700 – Apply for Benefits

The user must select the calculation they wish to use to start the process of applying for benefits.

My benefits

Home > My benefits

My plans

Below is a summary of your pension plan(s). Click on a plan to see plan details. You can also view your benefit payment details, tax information, or get an income verification letter for the plan.

PBGC plan number	Plan name ↑	My role
[REDACTED]	[REDACTED]	Participant

My benefit estimates

View details for the benefit estimates you have requested. You can apply for benefits for one of the completed estimates if your retirement date is within three to nine months of today, or you can request an estimate for a new retirement date.

PBGC processes applications for benefit three months in advance of actual retirement dates. **Plan your retirement early!**

Completed estimates

Requested on 03/08/2024 for [REDACTED]

- Retirement Date **June 01, 2024** (named survivor: DFGSSA, Survivor 1) **ELIGIBLE TO APPLY**
- Retirement Date **June 01, 2024** (named survivor: DFUOAJ, QOLPU R) **ELIGIBLE TO APPLY**
- Retirement Date **July 01, 2024** (named survivor: DFGSSA, Survivor 1) **ELIGIBLE TO APPLY**
- Retirement Date **July 01, 2024** (named survivor: DFUOAJ, QOLPU R) **ELIGIBLE TO APPLY**

Requested on 11/09/2023 for [REDACTED]

- Retirement Date **February 01, 2024** (named survivor: DFUOAJ, QOLPU R)
- Retirement Date **June 01, 2024** (named survivor: DFUOAJ, QOLPU R) **ELIGIBLE TO APPLY**
- Retirement Date **April 01, 2033** (named survivor: DFUOAJ, QOLPU R)

Requested on 11/09/2023 for [REDACTED]

- Retirement Date **February 01, 2024** (named survivor: DFUOAJ, QOLPU R)
- Retirement Date **June 01, 2024** (named survivor: DFUOAJ, QOLPU R) **ELIGIBLE TO APPLY**
- Retirement Date **April 01, 2033** (named survivor: DFUOAJ, QOLPU R)

Benefit estimate details

for retirement on **June 01, 2024** within the plan:

Home > My Benefits > Benefit estimate details

My benefit details

Named survivor: **DFUOAJ, QOLPU R** Survivor's birthday: **08/07/1959**

Survivor's relationship: **Spouse**

Retirement Benefit Estimate

Participant:	VNVBS DFUOAJ	Beneficiary:	QOLPU DFUOAJ
Date of Birth:	May 25, 1959	Date of Birth:	August 07, 1959
Annuity Start Date:	June 01, 2024	Beneficiary Type:	Spouse

	Benefit Form	Participant Benefit	Survivor Benefit
A:	Plan's Automatic Form for Unmarried Participant: Straight Life Annuity	\$1188.87	\$0.00
B:	Plan's Automatic Form for Married Participant: Joint-and-50% Survivor Annuity	\$1090.55	\$545.28
C:	Straight Life Annuity	\$1188.87	\$0.00
D:	Joint-and-50% Survivor Annuity	\$1090.55	\$545.28
E:	Joint-and-75% Survivor Annuity	\$1048.56	\$786.42
F:	Joint-and-100% Survivor Annuity	\$1009.68	\$1009.68
G:	Joint-and-50% Survivor 'Pop-up' Annuity	\$1071.80	\$535.90
H:	5-year Certain-and-Continuous Annuity	\$1174.69	\$1174.69
I:	10-year Certain-and-Continuous Annuity	\$1134.41	\$1134.41
J:	15-year Certain-and-Continuous Annuity	\$1075.46	\$1075.46

When you are ready, you can apply for benefits for the retirement date shown in this estimate. During this process you will:

- Verify your personal and contact information
- Select your benefit option
- Choose your beneficiaries
- Select your payment destination

You may also be asked to submit additional documents, but we will let you know which ones as you go through the steps.

[View all of my benefit estimates >](#)

[Save/Print Estimate Document](#)

[View Your Benefit Your Choice](#)

[Apply for benefits](#)

Apply for benefits

for retirement on June 01, 2024 within the [REDACTED]

1. My Information 👤
 - Confirm retirement date ✔
 - Verify personal information
 - Describe your relationship status
2. Benefit selection
3. Surviving Beneficiary
4. Payments
5. Taxes
6. Review & Submit

Retirement details

Calculated retirement date

Estimate document

June 01, 2024

1) When do you want to start your pension benefits?

Actual retirement date (Pension benefits beginning date from your optional benefit form)

Save & Continue

Apply for benefits

for retirement on June 01, 2024 within the [REDACTED]

1. My Information 👤
 - Confirm retirement date ✔
 - Verify personal information 👤
 - Describe your relationship status
2. Benefit selection
3. Surviving Beneficiary
4. Payments
5. Taxes
6. Review & Submit

Information about you

1) Personal information

Please review your personal information for accuracy. Please visit your [profile](#) to make any corrections.

Full name

VNVBS DFUOAJ

Date of birth

05/25/1959

SSN or ITIN

[REDACTED]

Mailing address

[REDACTED]

edit address

Gender

Male

edit information

Mobile phone

-

Other phone

[REDACTED]

Other phone extension

Back

Save & continue

Apply for benefits

for retirement on June 01, 2024 within the [REDACTED]

1. My Information

Confirm retirement date 

Verify personal information 

Describe your relationship status 

2. Benefit selection

3. Surviving Beneficiary

4. Payments

5. Taxes

6. Review & Submit

Marital status

1) Are you currently married?

No, I am not currently married. Yes, I am currently married.

Spouse's last name

DFUOUJ

Spouse's first name

QQLPU

Spouse's middle name

R

Other last name(s) used

Date of marriage * Required

MM/DD/YYYY 

Spouse's date of birth * Required

08/07/1959

You will need to mail a copy of your marriage certificate and your spouse's birth certificate.

2) Is there a court order?

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

No Yes

[Back](#)

[Save & Continue](#)

Apply for benefits

for retirement on **June 01, 2024** within the [REDACTED]

- 1. My Information ✓
 - Confirm retirement date ✓
 - Verify personal information ✓
 - Describe your relationship status ✓
- 2. Benefit selection ✓
- 3. Surviving Beneficiary ✓
- 4. Payments ✓
- 5. Taxes ✓
- 6. Review & Submit 🔄

Marital status

1) Are you currently married?

No, I am not currently married. Yes, I am currently married.

Spouse's last name

DFUOAJ

Spouse's first name

QOLPU

Spouse's middle name

R

Other last name(s) used

Date of marriage * Required

03/20/1983

Spouse's date of birth * Required

08/07/1959

You will need to mail a copy of your marriage certificate and your spouse's birth certificate.

2) Is there a court order?

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

No Yes

Date of court order * Required

MM/DD/YYYY

Name of alternate payee * Required

[Back](#)

[Save & Continue](#)

There is an embedded link if the user clicks – [Your Benefit, Your Choice – PBGC Benefit Options](#) that takes the user to descriptions of the different forms of benefit.

Apply for benefits

for retirement on **June 01, 2024** within the XXXXXXXXXX

- 1. My Information ✓
 - Confirm retirement date ✓
 - Verify personal information ✓
 - Describe your relationship status ✓
- 2. **Benefit selection** 🟢
- 3. Surviving Beneficiary
- 4. Payments
- 5. Taxes
- 6. Review & Submit

Election of benefit form

1) Select your form of benefit

Before you choose an option below, please read the example in [Your Benefit, Your Choice](#). Refer to the calculations included in your 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).

Note: You cannot change your benefit election (marked below) after PBGC makes the first payment to you.

Named survivor	Estimate document
DFUOAJ, QOLPU R	

Benefit Option

- A: Plan's Automatic Form for an **Unmarried** Participant (Straight Life Annuity with No Survivor Benefits)
- B: Plan's Automatic Form for a **Married** Participant (Joint and 50% Survivor Annuity)
- C: Straight Life Annuity
- D: Joint-and-50% Survivor Annuity
- E: Joint-and-75% Survivor Annuity
- F: Joint-and-100% Survivor Annuity
- G: Joint-and-50% Survivor "Pop-up" Annuity
- H: 5-year Certain-and-Continuous Annuity
 - Certain payment period starts on your Actual Retirement Date
- I: 10-year Certain-and-Continuous Annuity
 - Certain payment period starts on your Actual Retirement Date
- J: 15-year Certain-and-Continuous Annuity
 - Certain payment period starts on your Actual Retirement Date

If you are married and do not choose Benefit Form "B", you will need to print this application, and your spouse must complete the Spousal consent form.

[Back](#) [Save & Continue](#)

Apply for benefits

for retirement on June 01, 2024 within the

- 1. My Information ✓
 - Confirm retirement date ✓
 - Verify personal information ✓
 - Describe your relationship status ✓
- 2. Benefit selection ✓
- 3. **Surviving Beneficiary** ●
- 4. Payments
- 5. Taxes
- 6. Review & Submit

Designation of "Other beneficiary" for continuing payments

Complete this section if you elected any benefit form from D through J in Section 3 and checked "Other Beneficiary". If you elected a joint-and-survivor annuity, your beneficiary designation is final and cannot be changed after PBGC makes your first payment. If you elected a certain-and-continuous annuity, you may change your beneficiary at any time.

Note: The beneficiary will receive benefits that continue after your death, and will also receive any additional money owed to you at your death.

1) Who do you want to name as your surviving beneficiary?

Your selected survivor

DFUOAJ, QOLPU R

[Choose and review contact](#)

Surviving Beneficiary Review - screen 1 of 2 (user must scroll down)

Apply for benefits

for retirement on June 01, 2024 within the

- 1. My Information ✓
 - Confirm retirement date ✓
 - Verify personal information ✓
 - Describe your relationship status ✓
- 2. Benefit selection ✓
- 3. Surviving Beneficiary ✓
- 4. Payments
- 5. Taxes
- 6. Review & Submit

Designation of "Other beneficiary" for continuing payments

Complete this section if you elected any benefit form from D through J in Section 2 and checked "Other Beneficiary". If you elected a joint-and-survivor annuity, your beneficiary designation is final and cannot be changed after PBGC makes your first payment. If you elected a certain-and-continuous annuity, you may change your beneficiary at any time.

Note: The beneficiary will receive benefits that continue after your death, and will also receive any additional money owed to you at your death.

1) Who do you want to name as your surviving beneficiary?

DFUQAJ, QQLPU R

[Select a different contact >](#)

2) Add your surviving beneficiary details

Beneficiary's last name * Required

DFUQAJ

Beneficiary's first name * Required

QQLPU

Beneficiary's middle name

R

Beneficiary's relationship to you * Required

Spouse

Beneficiary's birthday * Required

08/06/1959

Beneficiary's contact information

Beneficiary's email * Required

mask@pbgc.gov

Beneficiary's mobile phone * Required

[REDACTED]

Beneficiary's other phone

Provide a telephone number

Beneficiary's other phone ext

3) Is your beneficiary's mailing address the same as your own?

No Yes

Surviving Beneficiary Review - screen 2 of 2

Beneficiary's mailing address

Country/Region

UNITED STATES OF AMERICA

Street address

[REDACTED]

[REDACTED]

[REDACTED]

City

[REDACTED]

State/Province

[REDACTED]

Zip/Postal code


[REDACTED]

Back

Save & Continue

Apply for benefits

for retirement on **June 01, 2024** within the [redacted]

- 1. My Information ✓
 - Confirm retirement date ✓
 - Verify personal information ✓
 - Describe your relationship status ✓
- 2. Benefit selection ✓
- 3. Surviving Beneficiary ✓
- 4. Payments 
- 5. Taxes
- 6. Review & Submit

Designation of "Other beneficiary" for continuing payments

Complete this section if you elected any benefit form from D through J in Section 2 and checked "Other Beneficiary". If you elected a joint-and-survivor annuity, your beneficiary designation is final and cannot be changed after PBGC makes your first payment. If you elected a certain-and-continuous annuity, you may change your beneficiary at any time.

Note: The beneficiary will receive benefits that continue after your death, and will also receive any additional money owed to you at your death.

Added surviving beneficiary

Full name
DFUOAJ, QOLPU R

Relationship
Spouse

[Edit](#)

[Back](#)

[Save & continue](#)

Apply for benefits

for retirement on June 01, 2024 within the [REDACTED]

1. My Information ✓
 - Confirm retirement date ✓
 - Verify personal information ✓
 - Describe your relationship status ✓
2. Benefit selection ✓
3. Surviving Beneficiary ✓
4. **Payments** 🟢
5. Taxes
6. Review & Submit

Method of receiving benefit payments

PBGC pays benefits through safe, secure and convenient electronic funds transfer. You will get your payment on time even if you are out-of-town or unable to get to the bank.

If you have a bank account, you can ask us to deposit your benefit payments to your account through Electronic Direct Deposit (EDD).

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 1-888-382-3111 (toll-free) or visit the ETA website at www.eta-find.gov.

Note: PBGC does not transfer funds to financial institutions outside the United States and its territories. *If you live outside the United States or its territories and do not have a U.S. bank account, PBGC will send your payment to your mailing address.*

1) How would you like to receive your payments?

- By EDD or ETA* to an account that must have your name on it.
-

By mail to my home address, which is the primary or secondary address you marked as your mailing address. You may choose this option if EDD or ETA would be difficult or a burden because:

- You do not have a bank account.
- You reside in a remote location that does not have the infrastructure to support EDD or ETA.
- It is too expensive for you to maintain a bank account.

[Back](#)

[Save & Continue](#)

Electronic Deposit option – screen 1 of 2 (user must scroll)

Apply for benefits
for retirement on June 01, 2024 within the []

Financial institution information

Please provide the information below for PBGC to send your payment directly to a financial institution. The information is available from your financial institution or can be found on your checks and account statements. The sample check below shows the location of your nine-digit routing number and your account number. If you are unsure of the routing number or your account number, contact your financial institution. You can cancel or change this arrangement by calling PBGC at 1-800-400-7242. The financial institution can cancel it by sending you a written notice.

1. My Information ✓
 Confirm retirement date ✓
 Verify personal information ✓
 Describe your relationship status ✓
2. Benefits selection ✓
3. Surviving Beneficiary ✓
4. Payments ●
5. Taxes
6. Review & Submit

JOHN DOE
1234 MAIN ST
FRESNO, CA 93711

DATE _____ 1234

PAY TO THE ORDER OF _____ \$ []
_____ DOLLARS

MEMO _____ MP

⑆ 121137726 ⑆ 1234 567 890000 ⑆

Routing No. Check No. Account No.

Security Features Included. Details on back.

Electronic Deposit option – screen 2 of 2

Name(s) on bank account (Your name must be on the account) * Required
[VVWS DFUGAU]

Account type * Required
 Checking
 Savings

Routing number * Required
[]

Account number * Required
[]

[Back](#) [Validate Bank Details](#)

Validating your bank details...

Name(s) on bank account (Your name must be on the account) * Required
VWV85 DFUQAJ

Account type * Required
 Checking
 Savings

Routing number * Required
[REDACTED]

Account number * Required
[REDACTED]

[Back](#) [Processing...](#)

Once the routing number has been validated, additional fields containing financial institution details are displayed and the user can the “Save & Continue” button to proceed.

Name(s) on bank account (Your name must be on the account) * Required
VWV85 DFUQAJ

Account type * Required
 Checking
 Savings

Routing number * Required
[REDACTED]

Account number * Required
[REDACTED]

Country/Region
United States of America

Street address
[REDACTED]

City
[REDACTED]

ZIP/Postal code
[REDACTED]

Institution/Bank name
[REDACTED]

[Back](#) [Save & Continue](#)

Apply for benefits

for retirement on **June 01, 2024** within the [REDACTED]

1. My Information ✓

- Confirm retirement date ✓
- Verify personal information ✓
- Describe your relationship status ✓

2. Benefit selection ✓

3. Surviving Beneficiary ✓

4. Payments ✓

5. Taxes 🟢

6. Review & Submit

Federal tax election

To make sure you receive your first monthly payment on time, PBGC will withhold for federal income tax using the required Internal Revenue Service (IRS) default tax election, which is single individual or married filing separately.

[Back](#) [Continue](#)

Review & Submit – screen 1 of 2 (user must scroll down)

Apply for benefits

for retirement on **June 01, 2024** within the [redacted]

- 1. My Information ✓
 - Confirm retirement date ✓
 - Verify personal information ✓
 - Describe your relationship status ✓
- 2. Benefit selection ✓
- 3. Surviving Beneficiary ✓
- 4. Payments ✓
- 5. Taxes ✓
- 6. Review & Submit 🟢

Review your information

And just like that you are done! Review one last time and click the "Submit button."

Your information

Calculated retirement date	Actual retirement date	
June 01, 2024	06/01/2024	
Working on retirement date?		
No		
Married		
Yes		
Are there any legal matters involved?	Date of Court Order	Name of Alternate Payee
No		DFGSSA, Survivor 1

Your benefit option

Benefit type
B: Plan's Automatic Form for Married Participant

Your beneficiaries

Surviving beneficiary

Name	Email
DFUOAJ, QOLPU R	mask@pbgc.gov
Relationship	Mobile phone
Spouse	[redacted]
SSN or ITIN	Other phone

Birthday	Other phone extension
08/07/1959	
	Mailing address
	[redacted]

Review & Submit – screen 2 of 2 (customer must scroll down)

Your payments

Method of receiving benefit payments

EDD / ETA

Name(s) on the Account (Your name must be on the account)

VNVBS DFUOAJ

Account number - Numbers only

██████████

Routing number

██████████

Account type

Savings

Don't forget to mail your documents

i You must submit the documents below before we can complete the application process.

- **Your proof of age document**
This can be a photo of your birth or baptism certificate, or your U.S. passport. Your driver's license is not a proof document.
- **If you are married, your proof of marriage**
Please send a copy of your marriage certificate.
- **If you are married and elected a benefit form other than option B, your Spousal Consent Form**
You will need to print this application and return the completed and notarized form, signed by your spouse. Please print clearly with blue or black ink.
- **If you selected a benefit form with a surviving beneficiary, proof of your surviving beneficiary's age**
This can be a photo of their birth or baptism certificate, or their U.S. passport.
- **If you want to choose a different federal tax withholding amount**
Please complete and submit IRS [Form W-4P](#).

Fax or mail documents to PBGC:

Fax: 202-229-4047

PBGC

P.O. Box 151750

Alexandria, VA 22315-1750

Submit

Form 701 – Payee Information

The screenshot displays the MyPBA (Pension Benefit Access) website interface. A white pop-up window titled "Customer Role Survey" is centered on the screen. The survey text reads: "Please confirm that you are a participant in [redacted] * Required". Below this text are two radio button options: "No" and "Yes". A blue "Submit" button is located at the bottom of the pop-up. The background website shows the MyPBA logo, navigation links for "My Transactions", "My Profile", "Contact us", and "Log off", and a "My summary" section with a breadcrumb "Home > My summary". A notification bar states: "Go green! Make email your preferred communication method using the 'Update information' button below." The "My information" section is partially visible at the bottom.

MyPBA
PENSION BENEFIT ACCESS

PBGC Pension Benefit Guaranty Corporation

[My Transactions](#) [My Profile](#) [Contact us](#) [Log off](#)

Customer Role Survey

Please confirm that you are a participant in [redacted] * Required

No Yes

[Submit](#)

My summary

Home > My summary

Welcome, TCVLEE TDRX
Customer ID: [redacted]

Notifications

There are no announcements from PBGC at this time.

✔ "Go green! Make email your preferred communication method using the "Update information" button below."


My information

Be sure your contact information is up to date!

If the user selects “yes” to confirm he is a participant in the plan, the user is directed to the My Summary page.

PBGC Pension Benefit Guaranty Corporation

[Home](#) [My Summary](#) [My Benefits](#) [My Documents](#) [My Transactions](#) [My Profile](#) [Contact us](#) [Log off](#)



My summary

[Home](#) > [My summary](#)

Welcome, TCVLEE TDNRX
Customer ID: ██████████

Notifications

There are no announcements from PBGC at this time.

"Go green! Make email your preferred communication method using the "Update information" button below."

My information

Be sure your contact information is up to date!

Mobile phone	-	Communication preference	Mail
Other phone		Preferred phone	
Email	mask@pbgc.gov	My mailing address	
Date of birth	11/12/1963		

[Update information](#)

Plans

Below is a summary of your pension plan(s). Click on a plan to see plan details. If you are receiving benefits, you can also view your benefit payment details, tax information, or get an income verification letter for the plan.

Your role in the pension plan is designated in the table under "My role." Please call us at 1-800-400-7242 if that information is incorrect.

PBGC plan number	Plan name ↑	My role
------------------	-------------	---------

If the user selects “No” to confirm he is a participant, he must select his correct role and fill in the information shown below.

MyPBA
PENSION BENEFIT ACCESS

My summary
Home > My summary

Welcome, TCVLEE.TDNRX
Customer ID: [REDACTED]

Notifications
There are no announcements from PBGC at this time.

Go green! Make email your preferred communication method

My information
Be sure your contact information is up to date!

Mobile phone: -
Other phone: -
Email: mask@pbgc.gov
Date of birth: 11/12/1963

Update information

Plans
Below is a summary of your pension plan(s). Click on a plan to see plan details.
Your role in the pension plan is designated in the table under "My role"

PBGC plan number	My role
16346600	Participant
19922400	Participant

Customer Role Survey

Please confirm that you are a participant in [REDACTED] * Required
 No Yes

Please select your role in [REDACTED]

Beneficiary -- The benefits are from the pension plan of someone who is deceased.

Spouse -- The benefits are from the pension plan of my spouse who is deceased.

Alternate Payee -- The benefits are from someone else's pension plan but were assigned to me based on a court order.

Participant's first name * Required
[REDACTED]

Participant's middle name
[REDACTED]

Participant's last name * Required
[REDACTED]

SSN or ITIN? * Required
SSN [REDACTED]

Participant's SSN or ITIN * Required
[REDACTED]

Participant's date of birth * Required
MM/DD/YYYY [REDACTED]

Participant's date of death * Required
MM/DD/YYYY [REDACTED]

Submit

Form 707 – Designation of Beneficiary for Benefits Owed at Death (Receiving Benefits)

Home > My benefits > My benefit details

PBGC plan number: [REDACTED]

See below for details about your pension plan and to designate beneficiaries.

[View payment & tax details](#) [Get income verification statement](#)

My benefit details

Your role in the pension plan is designated in the table under "My role." Please call us at 1-800-400-7242 if that information is incorrect.

My role	Plan sponsor
Participant	[REDACTED]

My beneficiaries

Below are the survivor(s) for continuing payments and beneficiary(ies) for payments owed at death you have designated under the plan.

PBGC must have current contact information for every person you designate as a survivor or beneficiary. Before you designate survivors or beneficiaries, make sure their information is in [Contacts](#). We cannot accept a designation without information in Contacts.

Designated survivor(s) for continuing payments

i You selected survivor(s) when you applied for benefits. You cannot change them.

Your designated survivors will receive any continuing annuity payments from your plan and any other money owed to you at the time of your death. You designate your survivors when you apply for your benefit. If you are receiving a joint-and-survivor annuity, you cannot change your designated survivor. If you are receiving a certain-and-continuous annuity or a modified cash refund annuity, you may change your designated survivor at any time.

Name	Relationship	Percentage	Date Designated
Contact, Third	Family Member	100.00%	2024-02-05

Designated beneficiary(ies) for payments owed at death

[Designate beneficiary\(ies\)](#)

If your designated survivor dies before you, your beneficiaries owed at death will receive any money that PBGC owes you at the time of your death. This designation does not apply to continuing annuity payments. You can change your designated beneficiaries at any time.

You have not added any beneficiaries.

Designated beneficiary(ies) for payments owed at death

[Designate beneficiary\(ies\)](#)

If PBGC owes you any money at the time of your death (besides continuing annuity payments), the money will go to your designated beneficiary(ies). You can change your designated beneficiaries at any time. This designation does not apply to continuing annuity payments.

You have not added any beneficiaries.

Designated beneficiaries

[Home](#) > [My benefits](#) > [My benefit details](#) > [Designated beneficiaries](#)

Designate beneficiary(ies) owed at death for [REDACTED]

If PBGC owes you any money at the time of your death (besides continuing annuity payments), the money will go to your designated beneficiary(ies). This designation does not apply to continuing annuity payments. By designating new beneficiaries, you will replace existing beneficiaries on file.

Enter a Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN), without dashes for each beneficiary. Include their share of the benefits in the **distribution percentage field**. SSN or ITIN is only required for individuals. Distribution percentages must total 100 between your selected beneficiaries.

You have not added any beneficiaries.

[Add beneficiary](#)

Designated beneficiaries

[Home](#) > [My benefits](#) > [My benefit details](#) > [Designated beneficiaries](#)

Designate beneficiary(ies) owed at death for [REDACTED]

If PBGC owes you any money at the time of your death (besides continuing annuity payments), the money will go to your designated beneficiary(ies). This designation does not apply to continuing annuity payments. By designating new beneficiaries, you will replace existing beneficiaries on file.

Enter a Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN), without dashes for each beneficiary. Include their share of the benefits in the **distribution percentage field**. SSN or ITIN is only required for individuals. Distribution percentages must total 100 between your selected beneficiaries.

Designation preview

Name	Percent designation
Contact_Third	100.00%

[Add beneficiary](#)

[Cancel](#)

[Designate beneficiary\(ies\)](#)



Are you sure you want to designate new beneficiary(ies)?

This will replace any existing beneficiary designation on file for chosen contacts.
This change will be pending confirmation and will not be reflected on your Plan Details screen for up to an hour..

Close

Designate

Designated beneficiaries

[Home](#) > [My benefits](#) > [My benefit details](#) > [Designated beneficiaries](#)

Designate beneficiary(ies) owed at death for [REDACTED]

If PBGC owes you any money at the time of your death (besides continuing annuity payments), the money will go to your designated beneficiary(ies). This designation does not apply to continuing annuity payments. By designating new beneficiaries, you will replace existing beneficiaries on file.

Enter a Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN), without dashes for each beneficiary. Include their share of the benefits in the **distribution percentage field**. SSN or ITIN is only required for individuals. Distribution percentages must total 100 between your selected beneficiaries.

Designation preview

Name	Percent designation
Contact_Third	100.00%

Add beneficiary

Cancel

Designate beneficiary(ies)

My summary

Home > My summary

Welcome, GDPMVX ULSCYTKY
Customer ID: [REDACTED]

Notifications

There are no announcements from PBGC at this time.

✔ "Go green! Make email your preferred communication method using the "Update information" button below."

My information

Be sure your contact information is up to date!

Mobile phone	-	Communication preference	Mail
Other phone		Preferred phone	
Email	mask@pbgc.gov	My mailing address	[REDACTED]
Date of birth	01/13/1958		

[Update information](#)

Plans

Below is a summary of your pension plan(s). Click on a plan to see plan details. If you are receiving benefits, you can also view your benefit payment details, tax information, or get an income verification letter for the plan.

Your role in the pension plan is designated in the table under "My role." Please call us at 1-800-400-7242 if that information is incorrect.

PBGC plan number	Plan name ↑	My role
[REDACTED]	[REDACTED]	Participant

All of my contacts

Contacts include your spouse, beneficiary, or authorized agents. You can view, add, or edit your contacts here, by clicking on their name. You can also remove contacts who are not current beneficiaries or authorized agents. Only **approved, unexpired authorized agents** can act on your behalf.

[Add contact](#)

Full name ↑	Mobile phone	City	State/Province	Relationship	Beneficiary?	Authorized agent?
Contact, Third	[REDACTED]			Family Member	Yes	No

To add a contact– Screen 1 of 2 (user must scroll down)

Add a contact

Home > My contacts > Add a contact

Main

Personal details

Is this an individual or organization? * Required

Individual

First name * Required

Demo

Middle name

Last name * Required

Spouse

Relationship * Required

Spouse

Date of birth * Required

01/02/1953

Date of death

MM/DD/YYYY

Email

Phone

Mobile phone * Required

Other phone

Provide a telephone number

Other phone ext

Mailing address

Line 1

Line 2

Line 3

City

Country

State/Province

Zip/Postal code

Cancel

Save

Form 708 – Designation of Beneficiary (Not Currently Receiving Benefits)

This designation is completed during the “Request a benefit calculation” process.

Request a benefit calculation

Get an estimate for the amount of benefit on the date you may want to start it.

1. Information review ✓
2. Retirement selection ✓
3. **Choose surviving beneficiary** 🟢
4. Review & submit

Choose surviving beneficiary

Your surviving beneficiary will receive any continuing annuity payments from your plan and any other money owed to you at the time of your death. Your benefit is calculated using the age of your surviving beneficiary. Depending on the benefit option you choose later, you may not be able to change your surviving beneficiary after you start to receive your benefit. Please choose carefully.

When you are ready to apply for benefits, if you are married and choose a surviving beneficiary that is not your spouse, you will need to download and return to PBGC a completed and notarized Spousal Consent Form.

Surviving beneficiaries to calculate

Full Name	Relationship	
QOLPU DFUOAJ	Spouse	Edit

[Modify beneficiary selections](#)

[Back](#) [Save & Continue](#)

If the user wants to add a new contact as a beneficiary, he will have to enter the following information -
Screen 1 of 2 (user must scroll down)

Request a benefit calculation

Get an estimate for the amount of benefit on the date you may want to start it.

1. Information review ✓
2. Retirement selection ✓
3. Choose surviving beneficiary ✓
4. Review & submit 🕒

Choosing surviving beneficiary

Your surviving beneficiary will receive any continuing annuity payments from your plan and any other money owed to you at the time of your death. Your benefit is calculated using the age of your surviving beneficiary. Depending on the benefit option you choose later, you may not be able to change your surviving beneficiary after you start to receive your benefit. Please choose carefully.

1)) Who do you want to name as a your surviving beneficiary?

Adding a new contact

[Select a different contact >](#)

2) Are your surviving beneficiary's details correct?

Beneficiary's first name * Required

Beneficiary's last name * Required

Beneficiary's relationship to you * Required

Beneficiary's birthday * Required

Beneficiary's contact information

Beneficiary's email * Required

Beneficiary's mobile phone number *
Required

Beneficiary's other phone number

Beneficiary's other phone extension

Mail address same as contact?

No Yes

Mailing address

Address line 1

Address line 2

Address line 3

City

Country

State/Province

Zip/postal code

Save & Continue

Form 710 – Application for Electronic Direct Deposit

Update payment method

Home > My benefits > Update Payment Method

Update payment method

My plans

Select the checkbox beside each plan you want to update payments for. Please note that the account number, routing number, and account type will be blank if the payment destination is not electronic deposit.

Plan name	Payment destination	Routing number	Account number	Account type
<input type="checkbox"/> [REDACTED]	ACH	[REDACTED]	[REDACTED]	Checking

Payment option

Payment destination * Required

Electronic direct deposits can only go to accounts in US banks. Outside the US, you must have a check mailed to your bank or your home.

Electronic direct deposit (also known as EDD or ACH) ▼

Enter your bank details. We need to validate the information before we can save it.

Bank routing number * Required

Bank account number * Required

Account type

Checking ▼

JOHN DOE
1234 MAIN ST
FRESNO, CA 93711

DATE _____ 1234

PAY TO THE ORDER OF _____ \$ _____

_____ DOLLARS

MEMO _____ MP

⑆ 22137261 234567 890000 ⑈

Routing No. Check No. Account No.

Cancel Validate bank details