

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

PBGC

- 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?

[Preview Filing](#)
[Click to View Instructions](#)

For questions related to SFA Annual Compliance Filings, contact multiemployerprogram@pbgc.gov.

Note:

- Fields marked with * are required to proceed further

Section B - Plan Documents

PBGC

- 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](#)

[Previous](#) [Save & Next](#)

[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.

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

Drag and drop to upload
or click to browse

Previous **Save & Next**

Instructions/Need Help?
Preview Filing
Click to View Instructions
For questions related to SFA Annual Compliance filings, contact multiemployerprograms@pbgc.gov.
Note:
• Fields marked with * are required to proceed further

PBGC.gov | Paperwork Reduction Act Notice

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.

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

Drag and drop to upload
or click to browse

Previous **Save & Next**

Instructions/Need Help?
Preview Filing
Click to View Instructions
For questions related to SFA Annual Compliance filings, contact multiemployerprograms@pbgc.gov.
Note:
• Fields marked with * are required to proceed further

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 Multemployer 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
-----------	---------------	-------------	--------------

There are no records to display.

Drag and drop to upload

[or click to browse](#)

Previous **Save & Next**

Instructions/Need Help?

[Preview Filing](#)

[Click to View Instructions](#)

For questions related to SFA Annual Compliance Filings, contact multemployerprogram@pbgc.gov.

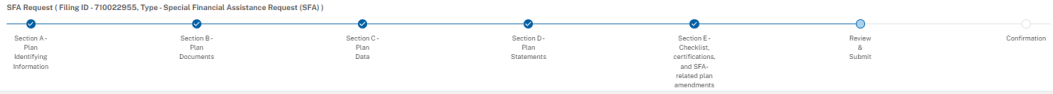
Note:

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

Instructions/Need Help?

[Preview Filing](#)
[Click to View Instructions](#)

For questions related to SFA Applications, contact multiemployerprogram@pbgc.gov

Note:

- Fields marked with * are required to proceed further

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](#)