

My PAA Home Page as of 1/7/24:

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PBGC My PAA
My Plan Administration Account

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My PAA Topics

- Now accepting 2024 Filings
- What's new in My PAA & Login Process
- How to Make a Payment?
- Automated Filing Status Transitions and Emails
- PBGC's Premium Disaster Relief Policy
- Scheduled Outages



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Please note that My PAA, this site, is for Pension Practitioners and Plan Administrators. If you are a worker, retiree, or beneficiary please visit MyPBA: My Pension Benefit Access for more...

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Contact PBGC's Premium Filer Customer Service Department

Please note that My PAA, this site, is for Pension Practitioners and Plan Administrators. If you are a worker, retiree, or beneficiary please visit MyPBA: My Pension Benefit Access for more...

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How to Log in to My PAA Using Login.gov?

If you are logging in to My PAA for the first time using Login.gov please view one of the following demos for step-by-step instructions (via screenshots or video): [How to Create a New My PAA Account...](#)

[Read](#)

Filing Status Transition

For further step-by-step instructions (via screenshots) please refer to PBGC's [How to Edit, Review, Certify, Approve and Submit a Filing demo](#). All screen prepared filings follow this...

[Read](#)

2023 Comprehensive Premium Filing Definitions

Definitions for terms shown throughout the Comprehensive Premium Filing instructions are shown below. "Alternative Premium Funding Target" - see the "Premium Funding Target" term. "Benefit..."

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Washington, DC 20024-2101

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- [Online Premium Filing](#)
- [Premium Filing Payment & Instructions](#)
- [Variable Rate Premiums](#)
- [Disaster Relief](#)
- [Plan Terminations](#)

Customer Contact

For Workers & Retirees
[1-800-400-7242](#)
8:00 a.m. to 7:00 p.m. Eastern Time Monday Through Friday
(Except [Federal Holidays](#))

For Employers & Practitioners
[1-800-736-2444](#)
8:00 a.m. to 5:00 p.m. Eastern Time Monday Through Friday
(Except [Federal Holidays](#))

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Plan List:

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Plans in your My PAA Account

Show 10 entries Search:

Latest Filing Status Filter: Draft Pending Admin Approval Upload Cancelled **FILTER** **CLEAR**

[How to Use the Plan List](#)

Create Filing	Plan ID	EIN	PN	Name	Latest Filing Update	Latest Filing ID	Latest PYC	Latest Filing Status
CREATE FILING	2420303	131311313	121	MY_PAA_2.0_PROD_CUT_OVER_CREATE_TEST_PLAN	11/01/2023	529538	01/01/2020	Upload Cancelled
CREATE FILING	86264	123456789	001	SPECIAL_NON-PREMIUM_TRANSACTIONS	10/25/2023	511161	01/01/2021	Draft

Plan Details page:

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Plan Details ACTIVE

Plan ID	Plan Name	EIN	PN	Effective Date	Coverage Date	Adoption Date	Plan Sponsor
555555	B.B.C.D Local Union #999 Pension Trust Fund	123456789	001	02/01/1999	02/01/1999	N/A	B.B.C.D Local Union #999

Plan Admin Details

Admin Name
John Doe

Email
jdoe@bbcdlocal.com

Phone
(555) 123-4567 x123

Address
P.O. Box 20854
Suite 123
Somewhere, VA 22222 USA

Plan Contact Details

Contact Name
John Doe

Email
jdoe@bbcdlocal.com

Phone
(555) 123-4567 x123

[Create Filing](#)

[Submit Request](#)

[Manage Roles](#)

[Payment Voucher](#)

[Account History](#)

[View Request Status](#)

[View Correspondence](#)

Premium Filings

Search filings

Filing ID	PYC	Submit Date	Status	
123456	07/04/2023		Draft	Filing Details Filing Receipt Amend
123456	07/04/2023	02/30/2023	Submitted / Successfully Processed	Filing Details Filing Receipt Amend
123456	07/04/2023	02/30/2023	Submitted / Successfully Processed	Filing Details Filing Receipt Amend
123456	07/04/2023	02/30/2023	Submitted	Filing Details Filing Receipt Amend

Team Members

[Manage Roles](#)

Search team members

Name	Roles	Email Address	Office Phone	Last Login	Disable Filing Status Emails?	Send Notification?
JOHN DOE	Filing Coordinator, Plan Admin, Actuary, Payment Preparer, Upload Preparer	name@email.com	(555) 555-555 x123	06/12/2023	<input type="checkbox"/> Disable	<input type="checkbox"/> Send
JANE SMITH	Filing Coordinator, Plan Admin, Actuary, Payment Preparer, Upload Preparer	name@email.com	(555) 555-555 x123	06/12/2023	<input type="checkbox"/> Disable	<input type="checkbox"/> Send
BOB JONES	Filing Coordinator, Plan Admin, Actuary, Payment Preparer, Upload Preparer	name@email.com	(555) 555-555 x123	06/12/2023	<input type="checkbox"/> Disable	<input type="checkbox"/> Send

Filing Details page:

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Plan Details ACTIVE

Plan ID	Plan Name	EIN	PN	Effective Date	Coverage Date	Adoption Date	Plan Sponsor
555555	B.B.C.D Local Union #999 Pension Trust Fund	123456789	001	02/01/1999	02/01/1999	N/A	B.B.C.D Local Union #999

Filing Progress DRAFT

Step	Status	Preparer	Date/Time	Action
Draft Started	Completed	John Doe	07/05/2023 03:39PM	
Draft Completion	Completed	Jane Smith	07/08/2023 01:18PM	Edit Draft
Actuary Certification	Completed	Jane Smith	07/08/2023 01:18PM	
Payment Option Selection	Completed	Bob Johnson	07/08/2023 04:07PM	
Administrator Certification	In Progress			Certify / Return for Edit
Filing Submission to PBGC	Pending			

Filing Details

Filing ID	PYC	Amount Due	Submitted Date
555555	02/01/1999	\$ 78,992.80	TBD

This Premium Filing is currently in DRAFT status.
If you do not want to proceed with this filing, select the CANCEL FILING option.
To request the Filing Preparer role, please see instructions on [How to Manage Roles](#).

- [Filing Summary](#)
- [Filing Receipt](#)
- [Payment Voucher](#)

[Cancel Filing](#)

File Attachments (3) [+ Add Attachment](#)

- saveOIAsession_formatted.txt (8.02 KB) ✗
- saveOIAsession_formatted.txt (8.02 KB) ✗
- saveOIAsession_formatted.txt (8.02 KB) ✗

In-Process Filings page:

In-Process Screen-Prepared Filings

Show entries Search:

Filing ID	Date Created	PYC	Plan ID	EIN/PN	Plan Name	Filing Status	
527292	10/12/2023	05/01/2021	2420303	131311313/121	MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN	Draft	FILING DETAILS
518305	09/27/2023		86264	123456789/001	SPECIAL NON-PREMIUM TRANSACTIONS	Draft	FILING DETAILS
511161	09/05/2023	01/01/2021	86264	123456789/001	SPECIAL NON-PREMIUM TRANSACTIONS	Draft	FILING DETAILS

My PAA Data Entry Screens - remain unchanged since 2021

Single-employer Plan 2021 Plan Year

I. General Plan
Year Information

General Plan Information

Comprehensive Premium Filing for: PBGC Test DB Plan
Plan ID: 2314933
EIN/PN: 159159158 / 333

General Plan
Information

II. Premium
Calculations

III. Other Filing
Details

IV. Review and
Summary

General Plan Information

Employer Identification Number (EIN):

159159158

Plan Number (PN):

333

Plan Name:

PBGC Test DB Plan

Sponsor's Name:

John Doe

First Six Digits of CUSIP:

Business Code Type

Accounting, Tax Preparation Bookkeeping, and Payroll Services

Business Code:

541211 Offices of Certified Public Accountants

Save and Continue

Exit

I. General Plan
Year Information

Additional Plan Information

Comprehensive Premium Filing for: PBGC Test DB Plan
Plan ID: 2314933
EIN/PN: 159159158 / 333

General Plan
Information

Additional Plan
Information

II. Premium
Calculations

III. Other Filing
Details

IV. Review and
Summary

Plan Admin Information

Admin Name:

Joseph Smith

Joseph Smith's Email Address:

jsmith@gmail.com

Joseph Smith Phone Number:

(301) 445-6666

Joseph Smith Ext:

Address1:

1290 Fennell St

Address 2:

City:

Boston

State:

MA

Zip:

23556

Country:

US

Plan Contact Information

Plan Contact Name (Correspondence Addressee):

Jane Doe

Jane Doe's Email Address:

jdoe@gmail.com

Jane Doe Phone Number:

(301) 888-7777

Jane Doe Ext:

123

Would you like to add additional plan contact information, Jane Doe?

Yes No

Additional Plan Contact Information

Name:

Mary Moore

Mary Moore's Email Address:

mmm@gmail.com

Mary Moore Phone Number:

(222) 555-6666

Mary Moore Ext:

555

Would you like to add alternate phone number for Insured Plans list on pbgc.gov, Jane Doe?

Yes No

Alternate Phone Information

Alternate Phone Number:

(123) 456-7899

Ext:

123

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Save and Continue

I. General Plan
Year Information

✓ General Plan
Information

✓ Additional Plan
Information

Plan Year Details

II. Premium
Calculations

III. Other Filing
Details

IV. Review and
Summary

Plan Year Details

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 01/01/2021

Filing Dates

Plan Year Commencing Date (PYC Date):

01 ▼ 01 ▼ 2021 ▼

Plan Year Ending Date (PYE Date):

12 ▼ 31 ▼ 2021 ▼

Plan Type:

Multiemployer
 Single-employer (including multiple-employer plans)

Is this a CSEC Plan?

Yes
 No

Has the PYC date changed since the most recent filing as a result of a plan amendment changing the plan year?

Yes
 No

Is this an amended filing?

- Yes
 No

If either the first or last day of the premium payment year reported in this amended filing differs from what was reported in the filing that is being amended, provide the dates that were reported in the original filing:

Date premium payment year commenced:


Date premium payment year ended:

If the EIN and PN reported in this amended filing are not both the same as what was reported in the filing that is being amended, enter the EIN and PN from the original filing:

EIN:

PN:

Amended Filing Explanation

Please provide an explanation of why an amended filing is necessary. 

Generic amended filing explanation.]

Plan Information

For the premium payment year, is the plan a "small plan"?

- Yes
 No

Plan Effective Date:

01 01 2020

Check box if plan is new or newly covered

New or Newly Covered Plan

Adoption Date:

01 01 2021

Date Coverage Began On:

01 01 2021

Is the plan a continuation plan:

- Yes
 No

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I. General Plan
Year Information

- ✓ General Plan Information
- ✓ Additional Plan Information
- ✓ Plan Year Details

EIN/PN Change Details

- II. Premium Calculations
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EIN/PN Change Details

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 01/01/2021

Do you want to report an EIN/PN change?

- Yes
- No

New EIN:

New PN:

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I. General Plan
Year Information

- ✓ General Plan Information
- ✓ Additional Plan Information
- ✓ Plan Year Details
- ✓ EIN/PN Change Details

Form 5500 Details

- II. Premium Calculations
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- IV. Review and Summary

Form 5500 Details

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 01/01/2021

Is the plan's EIN or PN different from what was reported on the most recently filed Form 5500?

- Yes
- No

Form 5500 EIN:

Form 5500 PN:

Reason for Difference:

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- ✓ I. General Plan Year Information
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- ✓ Flat-Rate Premiums
- III. Other Filing Details
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Flat-Rate Premiums

Comprehensive Premium Filing for: PBGC Test DB Plan
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 01/01/2021

Participant Count Date:

01 01 2021

Participant Count as of Participant Count Date:

Active:	275
Terminated Vested:	150
Retirees and Beneficiaries:	88

Total Participant Count: 513

Single-employer Flat-Rate (per participant): \$86.00

Calculated Flat-Rate premium: \$44,118.00

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- ✓ I. General Plan Year Information
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- ✓ Alternative Premium Funding Target Election or Revocation
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Alternative Premium Funding Target Election or Revocation

Comprehensive Premium Filing for: PBGC Test DB Plan
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 01/01/2021

Note: Elections or Revocations must remain in place for at least five (5) years.

- Election - Check box to elect to use the Alternative Premium Funding Target instead of the Standard Premium Funding Target. The election will be effective and the plan will be required to use the Alternative Premium Funding Target, beginning with this premium payment year and for all subsequent plan years unless and until the election is subsequently revoked.
- Revocation - Check box to revoke a prior election to use the Alternative Premium Funding Target. The revocation will be effective and the plan will be required to use the Standard Premium Funding Target, beginning with this premium payment year and for all subsequent plan years unless and until a new election is subsequently made.

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- ✓ Alternative Premium Funding Target Election or Revocation
- ✓ Variable-Rate Premiums (VRP)**
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Variable-Rate Premiums (VRP)

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 01/01/2021

VRP Exemptions

Is the plan exempt from the VRP?

- Yes
 No

Small Employer VRP Cap Qualification

Does the plan qualify for the VRP small employer cap (applicable for certain plans of small employers with 25 or fewer employees)?

- Yes
 No

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- ✓ I. General Plan Year Information
- ✓ II. Premium Calculations**
- ✓ Flat-Rate Premiums
- ✓ Alternative Premium Funding Target Election or Revocation
- ✓ Variable-Rate Premiums (VRP)
- ✓ Premium Funding Target Method**
- III. Other Filing Details
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Premium Funding Target Method

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 01/01/2021

Premium Funding Target Method:

Alternative

UVB Valuation Date:

01 01 2021

Discount Rates:

1st segment:

2nd segment:

3rd segment:

N/A, Full Yield Curve Used

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- ✓ I. General Plan Year Information
- ✓ II. Premium Calculations
 - ✓ Flat-Rate Premiums
 - ✓ Alternative Premium Funding Target Election or Revocation
 - ✓ Variable-Rate Premiums (VRP)
 - ✓ Premium Funding Target Method
 - ✓ **Calculating Unfunded Vested Benefits**
- III. Other Filing Details
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Calculating Unfunded Vested Benefits

Comprehensive Premium Filing for: PBGC Test DB Plan
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 01/01/2021

Is the plan reporting an estimated premium funding target as of the UVB Valuation date?

Yes
 No

Premium Funding Target as of UVB Valuation Date (dollars only)

Attributable to active participants	+	\$1,200,000.00
Attributable to terminated vested participants	+	\$76,000.00
Attributable to retirees and beneficiaries receiving payment	+	\$24,000.00
	=	
Total premium funding target		\$1,300,000.00

Market value of assets as of UVB valuation date (dollars only) \$658,222.00

Unfunded vested benefits (rounded up to the next \$1,000) \$642,000.00

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 - ✓ Flat-Rate Premiums
 - ✓ Alternative Premium Funding Target Election or Revocation
 - ✓ Variable-Rate Premiums (VRP)
 - ✓ Premium Funding Target Method
 - ✓ Calculating Unfunded Vested Benefits
 - ✓ **Variable-rate Premium Due**
- III. Other Filing Details
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Variable-rate Premium Due

Comprehensive Premium Filing for: PBGC Test DB Plan
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 01/01/2021

Show Calculations

<u>Uncapped VRP</u>	\$29,532.00
(\$642,000.00 x 0.046)	
<u>MAP-21 Cap</u>	\$298,566.00
(\$582.00 x 513)	

Calculated VRP \$29,532.00

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✓ I. General Plan Year Information

II. Premium Calculations

✓ Flat-Rate Premiums

✓ Alternative Premium Funding Target Election or Revocation

✓ Variable-Rate Premiums (VRP)

✓ Premium Funding Target Method

✓ Calculating Unfunded Vested Benefits

✓ Variable-rate Premium Due

Calculate Total Premium

III. Other Filing Details

IV. Review and Summary

Calculate Total Premium

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 01/01/2021

You've stated this plan qualifies for proration but the plan year is currently a full 12 months. If the reason for prorating the premium is because the plan anticipates distributing assets pursuant to a standard termination before year end but after the premium due date, consider using the *alternative approach* in the *Who Must File* section of the Comprehensive Premium Filing Instructions

Flat-rate Premium (FRP) \$44,118.00

+

Variable-rate Premium (VRP) \$29,532.00

=

Total Premium before reflecting \$73,650.00

proration

Does the plan qualify for proration?

Yes

No

Number of months (complete and partial) in the short plan year

6 ▼

Total premium \$36,825.00

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- ✓ I. General Plan Year Information
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- ✓ Flat-Rate Premiums
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- ✓ Premium Funding Target Method
- ✓ Calculating Unfunded Vested Benefits
- ✓ Variable-rate Premium Due
- ✓ Calculate Total Premium
- Premium Amount Due**
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Premium Amount Due

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 01/01/2021

Total Premium \$36,825.00

	Payments made previously for this premium payment year	<input type="text" value="\$0.00"/>
	+	
	Outstanding credit from the prior premium payment year	<input type="text" value="\$0.00"/>
	=	
	<u>Total credit for this plan year</u>	<input type="text" value="\$0.00"/>

<u>Total Premium amount due:</u>	\$36,825.00

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- ✓ I. General Plan Year Information
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Final Filing Information

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 01/01/2021

Note that all information reported in this section of the premium filing is simply informational. The selections and dates reported in this section do not trigger any pro-rata or recalculation of premiums.

Is this the plan's last filing?
 Yes
 No

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 - Plan Transfers**
- IV. Review and Summary

Plan Transfers

Comprehensive Premium Filing for: PBGC TEST DB PLAN

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 03/01/2021

Did this plan transfer some, or all assets or liabilities to another plan (or vice versa) since the most recent comprehensive premium filing?

- Yes
 No

Please provide the following information with respect to the plan to (or from) which assets or liabilities were transferred by clicking "Report a Plan Transfer" below.

Note: If more than one transfer needs to be reported, you must click "Report a Plan Transfer" for every transfer being reported. Please see instructions above for transfers involving new or newly covered plans.

****If there is a data entry error you will need to delete the row and reenter correct information.****

Transfer Type:	This Plan is the:	Transferor EIN/PN:	Transferee EIN/PN:	Transfer Date	De Minimis
Merger	Transferee Plan	589589589/333	159159158/333	03/01/2021	<input checked="" type="radio"/> Yes <input type="radio"/> No
Report a Plan Transfer					

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- III. Other Filing Details
 - ✓ Final Filing Information
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Plan Transfers Continued

Comprehensive Premium Filing for: PBGC TEST DB PLAN

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 03/01/2021

Transferee (Surviving) Plan: 159159158/333

Transferor Plan: 589589589/333

Additional information is needed because you indicated that this plan is the transferee plan (i.e., surviving) plan and the merger was de minimis:

Was this plan smaller than the transferor plan? (For purposes of this question, "small" is measured in terms of assets, see instructions)

- Yes
 No

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Edit Previous Data

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- ✓ Final Filing Information
- ✓ Plan Transfers
- ✓ Participation & Accrual Freeze**
- IV. Review and Summary

Participation & Accrual Freeze

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 01/01/2021

Participation Freeze

As of the beginning of the premium payment year, is this plan closed to new entrants?

- Yes
 No

Please enter the date the plan became closed to new entrants

01 ▼ 01 ▼ 2021 ▼

Accrual Freeze

As of the beginning of the premium payment year, are the benefit accruals under this plan partially or totally frozen?

- Yes
 No

Please enter the date the freeze became effective

01 ▼ 01 ▼ 2021 ▼

Please select the option that best describes the nature of the freeze

- For all participants, both pay and service are frozen
 For some participants, both pay and service are frozen
 For all participants, service is frozen and pay is not
 For some participants, service is frozen and pay is not
 Other (Enter Explanation)

Explanation

Accrual freeze explanation

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- ✓ Participation & Accrual Freeze
- ✓ Risk Transfer Activity**
- IV. Review and Summary

Risk Transfer Activity

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 01/01/2021

Did the plan provide one or more lump sum windows during the prior premium payment year?

- Yes
 No

Please report the number of participants eligible to elect a lump sum under all such windows and the number of participants who elected a lump sum

Participants not in pay status when lump sum was offered:

Eligible to elect lump sum

Elected lump sum

Participants in pay status when lump sum was offered:

Eligible to elect lump sum

Elected lump sum

Did the plan purchase annuities for a group of participants during the prior premium payment year?

- Yes
 No

Please report the number of participants for whom an annuity was purchased.

Participants in pay status when annuity was purchased

Participants not in pay status when annuity was purchased

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- ✓ I. General Plan Year Information
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- ✓ Risk Transfer Activity
- ✓ Disaster Relief**
- IV. Review and Summary

Disaster Relief

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 01/01/2021

Is this filing subject to an extended due date per PBGC's disaster relief announcement?

- Yes
 No

Note: You will not see codes in this list where the applicable Disaster Relief period has already passed or have not yet been reflected in our system. Please select the "Other" option if you would like to indicate a code which is not available in the list of values

Please select the identifying number of the applicable IRS Disaster Relief News Release

Other

Other IRS Disaster Relief News Release Number

MD-1234-01

Is the plan administrator's address in the disaster area covered by the applicable IRS News Release?

- Yes
 No

Please provide the following information as it relates to the person affected by the disaster:

Contact Name

Ed Reed

Contact Role

TPA

Address 1:

1200 K st

Address 2:

NW

City:

Washington

State:

DC

Zip Code:

20005

Country:

US

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Exit



- ✓ I. General Plan Year Information
- ✓ II. Premium Calculations
- ✓ III. Other Filing Details
- ✓ IV. Review and Summary
- ✓ **Filing Details Review**

Filing Details Review

You must select the checkbox to proceed with filing certifications

Please review the Filing Summary information below.

[Filing Summary](#)[Filing Receipt](#)

If you have completed the preparation of this filing, please select the checkbox below. You will then be presented with a list of filing team members, based on their roles, who can be notified of the next action for this filing. After you have confirmed any notifications, select the "Proceed to Certifications" button. Once you proceed, any changes to filing data can be made via the "Edit Draft" button from the Filing Details page.

If any draft filing changes are needed at this time, navigate back to make the desired updates, then return to this Summary page.

If you would prefer to save your progress and return at a later time to complete this draft filing, select "Exit".

The Summary Information for this filing is the following:

- **Plan Name:** PRACTITIONER REMOVED FROM ANOTHER PLAN
- **EIN/ID:** 898898988 / 898
- **Filing ID:** 506658
- **PYC:** 01/01/2023

I understand that by selecting this checkbox, I am indicating to PBGC that I have prepared this filing accurately and completely and that I am electing to proceed to filing certifications.

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CSEC Plan 2021 Plan Year

I. General Plan
Year Information

General Plan
Information

II. Premium
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General Plan Information

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Filing Submission Date: (For Testing Purposes)

11/16/2020



General Plan Information

Employer Identification Number (EIN):

159159158

Plan Number (PN):

333

Plan Name:

PBGC Test DB Plan

Sponsor's Name:

John Doe

First Six Digits of CUSIP:

Business Code Type

Accounting, Tax Preparation Bookkeeping, and Payroll Services



Business Code:

541211 Offices of Certified Public Accountants



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I. General Plan
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Additional Plan Information

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Admin Information

Admin Name:

Joseph Smith

Joseph Smith's Email Address:

jsmith@gmail.com

Joseph Smith Phone Number:

(301) 445-6666

Joseph Smith Ext:

Address1:

1290 Fennell St

Address 2:

City:

Boston

State:

MA

Zip:

23556

Country:

US

Plan Contact Information

Plan Contact Name (Correspondence Addressee):

Jane Doe

Jane Doe's Email Address:

jdoe@gmail.com

Jane Doe Phone Number:

(301) 888-7777

Jane Doe Ext:

123

Would you like to add additional plan contact information, Jane Doe?

Yes No

Additional Plan Contact Information

Name:

Mary Moore

Mary Moore's Email Address:

mmm@gmail.com

Mary Moore Phone Number:

(222) 555-6666

Mary Moore Ext:

555

Would you like to add alternate phone number for Insured Plans list on pbgc.gov, Jane Doe?

Yes No

Alternate Phone Information

Alternate Phone Number:

(123) 456-7899

Ext:

123

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Plan Year Details

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Plan Year Details

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 02/01/2021

A filing was previously submitted for the plan year shown. Consider whether the "amended filing" box should be checked or whether the plan year commencing (PYC) date should be updated.

Filing Dates

Plan Year Commencing Date (PYC Date):

02 ▼ 01 ▼ 2021 ▼

Plan Year Ending Date (PYE Date):

01 ▼ 31 ▼ 2022 ▼

Plan Type:

- Multiemployer
- Single-employer (including multiple-employer plans)

Is this a CSEC Plan?

- Yes
- No

Has the PYC date changed since the most recent filing as a result of a plan amendment changing the plan year?

- Yes
- No

This is an amended filing

Plan Information

For the premium payment year, is the plan a "small plan"?

- Yes
- No

Plan Effective Date:

01 ▼ 01 ▼ 2020 ▼

Check box if plan is new or newly covered

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EIN/PN Change Details

Comprehensive Premium Filing for: PBGC Test DB Plan
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 02/01/2021

Do you want to report an EIN/PN change?

- Yes
- No

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Form 5500 Details

Comprehensive Premium Filing for: PBGC Test DB Plan
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 02/01/2021

Is the plan's EIN or PN different from what was reported on the most recently filed Form 5500?

- Yes
- No

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Flat-Rate Premiums

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 02/01/2021

Participant Count Date:
 01 ▼ 31 ▼ 2021 ▼

Participant Count as of Participant Count Date:

Active:

Terminated Vested:

Retirees and Beneficiaries:

Total Participant Count: 225

CSEC Flat-Rate (per participant): \$19.00

Calculated Flat-Rate premium: \$4,275.00

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- ✎ Variable-Rate Premiums (VRP)
- ✓ Premium Funding Target Method
Calculating Unfunded Vested Benefits
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Variable-Rate Premiums (VRP)

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 02/01/2021

VRP Exemptions

Is the plan exempt from the VRP?

Yes

No

Small Employer VRP Cap Qualification

Does the plan qualify for the VRP small employer cap (applicable for certain plans of small employers with 25 or fewer employees)?

Yes

No

- ✓ I. General Plan Year Information
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 - ✓ Flat-Rate Premiums
 - ✓ Variable-Rate Premiums (VRP)
 - ✚ **Premium Funding Target Method**
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Premium Funding Target Method

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 02/01/2021

The PBGC has determined the Premium Funding Target Method on this filing: N/A, CSEC

UVB Valuation Date:

02 ▼ 01 ▼ 2021 ▼

Discount Rates:

CSEC Plan Rate:

6.99%

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- ✓ I. General Plan Year Information
- ✚ II. Premium Calculations
 - ✓ Flat-Rate Premiums
 - ✓ Variable-Rate Premiums (VRP)
 - ✓ Premium Funding Target Method
 - ✚ **Calculating Unfunded Vested Benefits**
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Calculating Unfunded Vested Benefits

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 02/01/2021

Is the plan reporting an estimated premium funding target as of the UVB Valuation date?

Yes
 No

Premium Funding Target as of UVB Valuation Date (dollars only)

Attributable to active participants	\$800,000.00
+	
Attributable to terminated vested participants	\$50,000.00
+	
Attributable to retirees and beneficiaries receiving payment	\$12,000.00
=	
Total premium funding target	\$862,000.00

Market value of assets as of UVB valuation date (dollars only) \$125,000.00

Unfunded vested benefits (rounded up to the next \$1,000) \$737,000.00

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 - ✓ Premium Funding Target Method
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 - ✓ **Variable-rate Premium Due**
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Variable-rate Premium Due

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 02/01/2021

Show Calculations

Uncapped VRP \$6,633.00
 (\$737,000.00 x 0.009)
MAP-21 Cap \$130,950.00
 (\$582.00 x 225)

Calculated VRP \$6,633.00

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- ✓ I. General Plan Year Information
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 - ✓ Flat-Rate Premiums
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 - ✓ Premium Funding Target Method
 - ✓ Calculating Unfunded Vested Benefits
 - ✓ Variable-rate Premium Due
 - ✓ **Calculate Total Premium**
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Calculate Total Premium

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 02/01/2021

Flat-rate Premium (FRP) \$4,275.00
 +
 Variable-rate Premium (VRP) \$6,633.00
 =
Total Premium before reflecting proration \$10,908.00

Does the plan qualify for proration?

Yes
 No

Total premium \$10,908.00

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- ✓ I. General Plan Year Information
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 - ✓ Flat-Rate Premiums
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 - ✓ Calculate Total Premium
- ✓ **Premium Amount Due**
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Premium Amount Due

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 02/01/2021

Total Premium \$10,908.00

Payments made previously for this premium payment year	+	<input style="width: 95%;" type="text" value="\$0.00"/>
Outstanding credit from the prior premium payment year	+	<input style="width: 95%;" type="text" value="\$0.00"/>
<u>Total credit for this plan year</u>	=	<input style="width: 95%;" type="text" value="\$0.00"/>

Total Premium amount due: \$10,908.00

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Final Filing Information

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 02/01/2021

Note that all information reported in this section of the premium filing is simply informational. The selections and dates reported in this section do not trigger any pro-ratio or recalculation of premiums.

Is this the plan's last filing?

- Yes
 No

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- ✓ **Filing Details Review**

Filing Details Review

You must select the checkbox to proceed with filing certifications

Please review the Filing Summary information below.

[Filing Summary](#)[Filing Receipt](#)

If you have completed the preparation of this filing, please select the checkbox below. You will then be presented with a list of filing team members, based on their roles, who can be notified of the next action for this filing. After you have confirmed any notifications, select the "Proceed to Certifications" button. Once you proceed, any changes to filing data can be made via the "Edit Draft" button from the Filing Details page.

If any draft filing changes are needed at this time, navigate back to make the desired updates, then return to this Summary page.

If you would prefer to save your progress and return at a later time to complete this draft filing, select "Exit".

The Summary Information for this filing is the following:

- **Plan Name:** PRACTITIONER REMOVED FROM ANOTHER PLAN
- **EIN/ID:** 898898988 / 898
- **Filing ID:** 506658
- **PYC:** 01/01/2023

I understand that by selecting this checkbox, I am indicating to PBGC that I have prepared this filing accurately and completely and that I am electing to proceed to filing certifications.

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Multiemployer Plan 2021 Plan Year

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General Plan Information

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

General Plan Information

Employer Identification Number (EIN):

159159158

Plan Number (PN):

333

Plan Name:

PBGC Test DB Plan

Sponsor's Name:

John Doe

First Six Digits of CUSIP:

Business Code Type

Accounting, Tax Preparation Bookkeeping, and Payroll Services

Business Code:

541211 Offices of Certified Public Accountants

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Additional Plan Information

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Admin Information

Admin Name:

Joseph Smith

Joseph Smith's Email Address:

jsmith@gmail.com

Joseph Smith Phone Number:

(301) 445-6666

Joseph Smith Ext:

Address1:

1290 Fennell St

Address 2:

City:

Boston

State:

MA

Zip:

23556

Country:

US

I. General Plan Year Information

✓ General Plan Information

✓ Additional Plan Information

Plan Year Details

EIN/PN Change Details

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Plan Year Details

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 06/01/2021

A filing was previously submitted for the plan year shown. Consider whether the "amended filing" box should be checked or whether the plan year commencing (PYC) date should be updated.

Filing Dates

Plan Year Commencing Date (PYC Date):

06 01 2021

Plan Year Ending Date (PYE Date):

05 31 2022

Plan Type:

- Multiemployer
 Single-employer (including multiple-employer plans)

Has the PYC date changed since the most recent filing as a result of a plan amendment changing the plan year?

- Yes
 No

This is an amended filing

Plan Information

For the premium payment year, is the plan a "small plan"?

- Yes
 No

Plan Effective Date:

01 01 2020

Check box if plan is new or newly covered

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EIN/PN Change Details

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 06/01/2021

Do you want to report an EIN/PN change?

- Yes
 No

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Form 5500 Details

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Form 5500 Details

Comprehensive Premium Filing for: **PBGC Test DB Plan**

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 06/01/2021

Is the plan's EIN or PN different from what was reported on the most recently filed Form 5500?

- Yes
 No

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Flat-Rate Premiums

Comprehensive Premium Filing for: **PBGC Test DB Plan**

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 06/01/2021

Participant Count Date:

05 31 2021

Participant Count as of Participant Count Date:

Active: 500

Terminated Vested: 75

Retirees and Beneficiaries: 25

Total Participant Count: 600

Multiemployer Flat-Rate (per participant): \$31.00

Calculated Flat-Rate premium: \$18,600.00

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✓ I. General Plan Year Information

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✓ Flat-Rate Premiums

Calculate Total Premium

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Calculate Total Premium

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 06/01/2021

Flat-rate Premium (FRP) \$18,600.00

Total Premium before reflecting proration \$18,600.00

Does the plan qualify for proration?

Yes

No

Total premium \$18,600.00

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✓ I. General Plan Year Information

II. Premium Calculations

✓ Flat-Rate Premiums

✓ Calculate Total Premium

Premium Amount Due

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Premium Amount Due

Comprehensive Premium Filing for: PBGC Test DB Plan

Plan ID: 2314933

EIN/PN: 159159158 / 333

Plan Year Commencing: 06/01/2021

Total Premium \$18,600.00

Payments made previously for this premium payment year

\$0.00

+

Outstanding credit from the prior premium payment year

\$0.00

=

Total credit for this plan year

\$0.00

Total Premium amount due: \$18,600.00

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Final Filing Information

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 06/01/2021

Note that all information reported in this section of the premium filing is simply informational. The selections and dates reported in this section do not trigger any pro-rata or recalculation of premiums.

Is this the plan's last filing?

- Yes
 No

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- ✓ I. General Plan Year Information
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Plan Transfers

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 06/01/2021

Do you need to report a plan transfer?

- Yes
 No

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- ✓ I. General Plan Year Information
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- ✚ Participation & Accrual Freeze**
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Participation & Accrual Freeze

Comprehensive Premium Filing for: **PBGC Test DB Plan**
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 06/01/2021

Participation Freeze

As of the beginning of the premium payment year, is this plan closed to new entrants?

- Yes
 No

Accrual Freeze

As of the beginning of the premium payment year, are the benefit accruals under this plan partially or totally frozen?

- Yes
 No

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- ✓ Risk Transfer Activity
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Risk Transfer Activity

Comprehensive Premium Filing for: PBGC Test DB Plan
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 06/01/2021

Did the plan provide one or more lump sum windows during the prior premium payment year?

- Yes
 No

Did the plan purchase annuities for a group of participants during the prior premium payment year?

- Yes
 No

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Disaster Relief

Comprehensive Premium Filing for: PBGC Test DB Plan
Plan ID: 2314933
EIN/PN: 159159158 / 333
Plan Year Commencing: 06/01/2021

Is this filing subject to an extended due date per PBGC's disaster relief announcement?

- Yes
 No

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- ✓ **Filing Details Review**

Filing Details Review

You must select the checkbox to proceed with filing certifications

Please review the Filing Summary information below.

[Filing Summary](#)[Filing Receipt](#)

If you have completed the preparation of this filing, please select the checkbox below. You will then be presented with a list of filing team members, based on their roles, who can be notified of the next action for this filing. After you have confirmed any notifications, select the "Proceed to Certifications" button. Once you proceed, any changes to filing data can be made via the "Edit Draft" button from the Filing Details page.

If any draft filing changes are needed at this time, navigate back to make the desired updates, then return to this Summary page.

If you would prefer to save your progress and return at a later time to complete this draft filing, select "Exit".

The Summary Information for this filing is the following:

- **Plan Name:** PRACTITIONER REMOVED FROM ANOTHER PLAN
- **EIN/ID:** 898898988 / 898
- **Filing ID:** 506658
- **PYC:** 01/01/2023

I understand that by selecting this checkbox, I am indicating to PBGC that I have prepared this filing accurately and completely and that I am electing to proceed to filing certifications.

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