

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

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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

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New Filing



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

* Required

☐ Start new

☐ Pre-populate from previous filing

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New Filing



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](#)

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<https://efiling.pbgc.gov/dashboard/multiemployer-dashboard/>

Section A - Plan Identifying Information



Single-Employer Filings Dashboard

Multiemployer Filings Dashboard

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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

Notes: This figure should match the amount reported in Section E, Item 5.

\$

Instructions/Need Help?

Preview Filing

Click to View Instructions

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

Notes

Fields marked with * are required to proceed further

Save & Next

Section B - Plan Documents



Single Employer Filings Dashboard

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

Section A - Plan Identifying Information

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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

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

(2) Actuarial valuation reports.

(3) Rehabilitation plan or funding improvement plan.

(4) Form 9500.

(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



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Section C – Plan Data



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Review & Submit

Confirmation

Plan Data

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

(1) Form 5500 projection.

(2) Contributing employers.

(3) Historical plan information.

(4) SFA determination.

(5) Baseline details.

(6) Reconciliation details.

(7) Assumption/method changes.

(8) Contributions and withdrawal liability details.

(9) Participant data.

(10) Assumption summaries.

Attachments

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

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Note:

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Section D – Plan Statements



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Confirmation

Plan Statements

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

Attachments

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

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Note:

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



Single-Employer Filings Dashboard

Multimultiemployer Filings Dashboard

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Review & Submit

Confirmation

Checklist, Certifications, and SFA-Related Plan Amendments

Please upload documents to this section in accordance with the General Instructions for Multimultiemployer 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 Reinstated Pension Order

(10) Penalty of Perjury Statement

Attachments

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

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For questions related to SFA Annual Compliance Filings, contact multimultiemployerprogram@pbpc.gov.

Note: Fields marked with * are required to proceed further

Review & Submit



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



Review & Submit

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

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

Note:

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Filing Details

Plan Identifying Information

Plan Name *
Text

EIN *
11111111

PN *
001

Notice Filer Name *
Test Filer

Role of Filer *
Trustee

Total Amount Requested *
\$ 5,000,000.00

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

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