

August 15, 2025

Ms. Janet Dhillon  
Acting Assistant Secretary  
Office of Policy and Research, Room N-5718  
Employee Benefits Security Administration (EBSA)  
U.S. Department of Labor  
200 Constitution Avenue, NW  
Washington, DC 20210

RE: *Federal Register* notice of July 11, 2025 for the Employee Benefits Security Administration's Form 5500, Annual Return/Report of Employee Benefit Plan (OMB Number: 1210-0110)

Dear Ms. Dhillon:

The Bureau of Economic Analysis (BEA) strongly supports the continued collection of data by the Employee Benefits Security Administration's Form 5500. This form is our main data source for key components of BEA's economic statistics.

BEA uses actuarial information and financial information from Form 5500 to derive estimates of household income attributable to private defined pension plans. Specifically, data from Schedules H (Financial Information) and I (Financial Information – Small Plan) are used to prepare estimates of the assets of private defined benefit pension plans, employer contributions to the plans, benefit payments and withdrawals from the plans, and the administrative expenses of the plans. Data from schedules MB (Multiemployer Defined Benefit Plan and Certain Money Purchase Plan Actuarial Information) and SB (Single-Employer Defined Benefit Plan Actuarial Information) are used to construct national totals of actuarial current benefit entitlements earned by plan participants and national totals of actuarial accrued benefit entitlements earned by plan participants and retirees. The multiple time series estimates derived from Form 5500 are published annually in the national income and product accounts; some series are also provided to the Federal Reserve for use in compiling the financial accounts of the United States. A list of the items used by BEA is attached.

Please keep BEA informed concerning any modifications to this form. We are particularly interested in any modifications proposed during the forms approval process that would substantially affect our use of these data. For additional information, please contact Tiffany Burrell, Source Data Coordinator, on 301-278-9618 or by e-mail at [Tiffany.Burrell@bea.gov](mailto:Tiffany.Burrell@bea.gov). If you need assistance in justifying this form to the Office of Management and Budget, please do not hesitate to contact BEA.

Sincerely,

Dennis J. Fixler  
Chief Economist

Attachment

## ATTACHMENT

### Items from Form 5500 Used by BEA

<b>Items used by BEA:</b>	<b>How items are used by BEA:</b>
<p><b>Schedule H Financial Information</b></p> <p>Part 1 Part 2</p>	<p>Net assets Contributions Benefit payments Administrative service providers</p>
<p><b>Schedule I Financial Information for Small Plans</b></p> <p>Part 1</p>	<p>Net plan assets Contributions Benefits paid Administrative service providers</p>
<p><b>Schedule MB Multiemployer Defined Benefit Plan and Certain Money Purchase Plan Actuarial Information</b></p> <p>Part 1</p> <p>Part 2</p> <p>Part 6</p>	<p>Current value of assets Actuarial value of asset for funding standard accounts RPA 94 information (all items) Expected plan disbursements</p> <p>RPA 94 current liability/participant count breakdown (all items)</p> <p>Interest rate for RPA 94 current liability (all items)</p>
<p><b>Schedule SB Single-Employer Defined Benefit Plan Actuarial Information</b></p> <p>Part 1</p> <p>Part 8</p>	<p>Funding target/participant count breakdown (all items) Effective interest rate Target normal cost</p> <p>Target normal cost and excess assets (all items)</p>