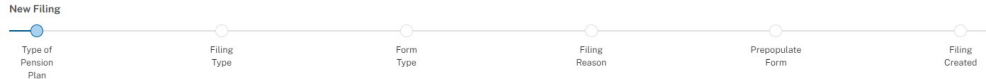


# SFA Request EFP Screenshots



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- Multiemployer Filings Dashboard
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## Type of Pension Plan

\* Required

 Multiemployer

 Single-Employer

Next



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## 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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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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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

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?**

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For questions related to SFA Annual Compliance Filings, contact [multiemployerprogram@pbgc.gov](mailto:multiemployerprogram@pbgc.gov).

**Note:**

- Fields marked with \* are required to proceed further

## Section B - Plan Documents

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**

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**Note:**

- Fields marked with \* are required to proceed further

## 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.			

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**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.			

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or click to browse

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



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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 Multiemployer 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
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There are no records to display.

Drag and drop to upload



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[Preview Filing](#)

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#### Note

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# 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

### Instructions/Need Help?

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For questions related to SFA Applications, contact [multiemployerprogram@pbgc.gov](mailto:multiemployerprogram@pbgc.gov)

**Note:**  
• Fields marked with \* are required to proceed further

### Filing Details

#### Plan Identifying Information

Plan Name \*

EIN \*

PIN \*

Notice Filer Name \*

Role of Filer \*

Total Amount Requested \*

#### 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

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