

# **My Plan Administration Account (My PAA) Review, Edit, Sign, and Route a Filing**



# Review, Edit, Sign, and Route a Filing

## My PAA Login Page

- Enter your User ID into the field labeled “User ID” on the My PAA login page.
- Enter your Password into the field labeled “Password”.
- Select the button labeled “Login”.

### My PAA Login

Welcome to My Plan Administration Account (My PAA), where you can electronically submit pension plan premium filings and payments to PBGC.

#### What's New and How to Use My PAA

- [What's New for Practitioners](#): Premium filings for plan year 2015 may now be submitted.
- [What's New in My PAA](#)
- [Password Rules](#)
- [More about My PAA](#): e-filing options, payment options, FAQs, Tips, Users Manual, etc.

➔ **User ID:**

➔ **Password:**  (Case Sensitive)

➔ **Login**

[➔ Forgot your User ID?](#)   [➔ Forgot your Password?](#)

[➔ New users click here to sign up.](#)

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# Review, Edit, Sign, and Route a Filing

## Launch Page

- You are now logged into My PAA.
- If the Launch Page overlaid on top of your Home Page is displayed, select the “Review In-Process Filing(s)” link in the Returning Users section.
  - ❖ The All In-Process Filing(s) Page will be displayed (slide 3).
- If the Home Page is displayed, go to the slide 4.

Note: The Launch Page is intended to help you initiate the premium related tasks. If you prefer not to see this page when you login, check the “Do not show this page at login” box and select “Close”.

**My PAA (My Plan Administration Account) Launch Page**

What do you want to do in My PAA (PBGC's premium e-filing application)?

Select the link(s) below to go to the section of the screens to initiate the tasks shown.

**New Users:**

- [Get Started](#)

**Returning Users:**

- [Review In-Process Filing\(s\)](#)
- [Create a Filing](#)
- [Import a Filing](#)
- [Upload a Filing](#)
- [Go to Home Page](#)
- [Go to a Plan's Page \(e.g., to review an account history\)](#)
- [Update My PAA Account](#)

**Filing Coordinators:**

- [Add a Plan](#)
- [Add a Practitioner](#)
- [Remove a Practitioner](#)
- [Change a Practitioner's Permissions](#)

**Additional Resources:**

- [Helpful Links](#)

Do not show this page at login

Close

# Review, Edit, Sign, and Route a Filing

## From the All In-Process Filing(s) Page

- Select the appropriate “Filing” link in the filing column.
  - ❖ The “Filing Manager” page will be displayed (Slide 5).

Note: You can sort the columns to find a particular filing.



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LAUNCH PAGE HOME PLANS ▾ FILINGS ▾ HELP My Account Logout

### All In-Process Filing(s) [Instructions](#)

Held By Me  Held By Others  All Filings [Clear Sort](#)

Filing ▾	Last Routed ▾	Plan Name ▾	EIN/PN ▾	Held By ▾
2015 Comprehensive		My Retirement Plan	88-8888888/ 750	Jack Black
2015 Comprehensive	04/07/2015	Retirement Plan 4	55-6666666/ 777	Jack Black
2015 Comprehensive		Retirement Plan1	11-2222222/ 123	Jack Black
2015 Comprehensive		Retirement Plan2	22-3333333/ 444	Jack Black
2015 Comprehensive		Retirement Plan3	44-5555555/ 777	Jack Black

# Review, Edit, Sign, and Route a Filing

## From the Home Page

- Select the appropriate “Filing” link in the In-Process Filings section.
  - ❖ The “Filing Manager” page will be displayed (Slide 5).
- If necessary, select the “View all in-Process Filings” link to see all of the plan’s in-process filings (Slide 3).

Note 1: You can sort the columns to find a particular filing.

Note 2: The Menu Bar on the top of every My PAA screen can be used to easily access other pages, e.g., the Launch Page, and Help information.

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 Welcome, Jack Black! My Account Logout

LAUNCH PAGE HOME PLANS FILINGS HELP

### Home Page

#### Quick Links

- Add Plan
- Create Filing
- Import Filing
- Upload Filing

#### Right Now

- 4 Filings Count (In-Process)
- 4 You Hold
- 0 Others Hold
- 6 Plans Count

#### In-Process Filings

View all In-Process Filings >

Filing	Last Routed	Plan Name	EIN/PN	Held By
2015 Comprehensive		My Retirement Pension Plan	88-8888888 / 750	Jack Black
2015 Comprehensive	11/2015	Retirement Plan 4	55-6666666 / 777	Jack Black
2015 Comprehensive		Retirement Plan1	11-2222222 / 123	Jack Black
2015 Comprehensive		Retirement Plan2	22-3333333 / 444	Jack Black

#### Plans in Jack Black's Account

View all Plans >

Plan Name	EIN/PN	Actions
Pension Plan1	44-1111111 / 444	Create a Filing, Invite a Practitioner
Retirement Plan 4	55-6666666 / 777	Create a Filing, Invite a Practitioner
Retirement Plan1	11-2222222 / 123	Create a Filing, Invite a Practitioner
Retirement Plan2	22-3333333 / 444	Create a Filing, Invite a Practitioner
Retirement Plan3	44-5555555 / 777	Create a Filing, Invite a Practitioner
Retirement Plan5	88-8888888 / 750	Create a Filing, Invite a Practitioner

#### Import Software-Prepared Filing(s)

Transfer filing data into My PAA editing screens for review and submission for any plan(s) in your account.

Import Filing(s)

#### Upload Software-Prepared Filing(s)

View all Uploads >

Submit fully-completed filing(s) for any plan(s) once you have at least one plan in your account. After the file is uploaded, click the link (if shown) under "Conf. ID/ Receipt" to view the receipt(s) showing data submitted

Upload Filing(s)

# Review, Edit, Sign, and Route a Filing

## Filing Manager page – View/Edit Filing

- Review the Filing status in the Filing Status section to see whether the filing is ready for submission and who is holding the filing.
- Select the “View/Edit Filing” button in the Filing Task List section to view or edit the filing.
  - ❖ The Data Summary Page will be displayed (Slide 6).

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**Step 2: Edit Draft, Sign Filing, and Select Payment Alternative**  
 Comprehensive Filing for Plan Year Commencing 1/1/2015  
 Retirement Plan 4 – 55-6666666 / 777

**Filing Manager**

This Filing Has **NOT** Been Submitted Go to Plan Page

**Filing Status**

Filing is: **not ready for submission** (refer to 'To submit this filing' below)  
 You are holding the filing

**Filing Task List** ➤ Instructions

<b>View/Edit Filing</b> ✓	This filing contains all the required information; however, a complete filing does not necessarily indicate that there are no errors. To review warning messages related to common mistakes, click the View button.	<b>Delete Filing</b>
<b>Sign</b>	Sign as Plan Administrator or PA Representative	
<b>Sign</b>	Sign as Actuary	
<b>Authorize</b>	Authorize as Paying Agent	

**To take action on this filing:**

- You must be holding the filing (otherwise, only "View Filing" is available). Tasks listed reflect your permissions for this plan. Permissions are listed in the Filing Team section below.
- Note: If a change is made that affects the amount due or variable-rate premium information, any signatures/authorizations will be removed. The filing will need to be re-signed/authorized.

**To submit this filing:**

- You must be holding the filing and must have the Plan Administrator, PA Representative or Filing Coordinator permission.
- The task list must indicate that the filing contains all required information.
- Each required signature/authorization on the task list must be completed.

**Filing Team** ➤ Instructions

The filing coordinator can change permissions from the [plan page](#)

Name	Permissions	Phone	E-mail	
Jonny Doe	Preparer, Paying Agent	313-313-3333	jonnydoe@workemail.com	<b>Route To</b>
Jack Black	Actuary, View Account History, Filing Coordinator, Paying Agent, Plan Administrator, Preparer	123-123-1234	jblack@workemail.com	Holding

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# Review, Edit, Sign, and Route a Filing

## Data Summary Page

- This page lists all information entered thus far for your filing, separated into subsections.
- Select the “Print this Page” link on the top right corner of the page, to print this filing summary.
- Select the “View Printable Form” on the top right corner of the page, to view or print the draft filing receipt.
- Select the “Edit” link at the top of the each subsection, to make any changes to the filing data.
- Select the “Save Changes” button, to go to the next screen.
- Note: The “NA” next to any Item on this page indicates that the item was not answered or not applicable for the current filing.

### Step 2: Edit Draft, Sign Filing, and Select Payment Alternative

Comprehensive Filing for Plan Year Commencing 1/1/2015  
Retirement Plan 4 – 55-666666 / 777

[Print this Page](#)   
[View Printable Form](#)

1 → 2 → 3 → 4  
Start a Draft Filing    Edit Draft, Sign Filing, and Select Payment Alternative    Submit Filing with Payment (if any)    Receive Filing Confirmation

#### Data Summary

Please review the following reminders and verify that the correct information has been reported:  
• The business code does not appear to be valid. Please verify and change the entry if appropriate.

[Cancel](#) [Save Changes](#)

Note: N/A indicates that this item was not answered or is not applicable.

<b>Identify Filing to be Made</b>	<a href="#">Edit</a>
Plan Year Commencement Date:	1/1/2015
Plan Year Ending Date:	12/31/2015
Date plan year change adopted (if any):	N/A
Plan Type:	Single-employer
Filing Type:	Comprehensive
Plan qualifies for proration:	Not Checked
Plan size (small plan):	No

<b>Enter Plan Information</b>	<a href="#">Edit</a>
Plan Name:	Retirement Plan 4
Plan effective date:	1/1/2015
New or Newly Covered Plan:	Not Checked
Adoption date:	N/A
Date coverage began:	N/A
Continuation Plan:	N/A
Previous EIN / PN:	55-666666 / 777
Current EIN / PN:	55-666666 / 777
EIN/PN from 2014 Form 5500 (if different):	N/A
Explanation as to why EIN/PN does not match entry on 2014 Form 5500:	N/A

<b>Enter Filing Information</b>	<a href="#">Edit</a>
6-digit business code:	111110
First 6 digits of CUSIP number:	N/A
Disaster Relief Code:	N/A
Variable-rate Exempt:	No
Reason for Exemption:	N/A

# Review, Edit, Sign, and Route a Filing

## Filing Manger page – Sign Filing

- Use this page to sign the filing as the Plan Administrator (PA) or PA Representative (PA Rep).
- The “Sign” button(s) will only show if you are holding the filing and have the appropriate permission(s).
- Select the “Sign” button as PA or PA Rep.
  - ❖ The Approval for Comprehensive Filing Page will be displayed (Slide 8).


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LAUNCH PAGE
HOME
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FILINGS ▾
HELP
My Account   Logout

### Step 2: Edit Draft, Sign Filing, and Select Payment Alternative

Comprehensive Filing for Plan Year Commencing 1/1/2015  
Retirement Plan 4 – 55-6666666 / 777

**Filing Manager**

This Filing Has **NOT** Been Submitted Go to Plan Page

**Filing Status**

Filing is: not ready for submission (refer to "To submit this filing" below)

You are holding the filing

**Filing Task List** : Instructions

View/Edit Filing	<div style="display: flex; justify-content: space-between; align-items: center;"> <span>✓</span> <span>This filing contains all the required information; however, a complete filing does not necessarily indicate that there are no errors. To review warning messages related to common mistakes, click the View button.</span> <span style="background-color: #003366; color: white; padding: 2px 5px;">Delete Filing</span> </div>
Sign	Sign as Plan Administrator or PA Representative
Sign	Sign as Actuary
Authorize	Authorize as Paying Agent

**To take action on this filing:**

- You must be holding the filing (otherwise, only 'View Filing' is available). Tasks listed reflect your permissions for this plan. Permissions are listed in the Filing Team section below.
- Note: If a change is made that affects the amount due or variable-rate premium information, any signatures/authorizations will be removed. The filing will need to be re-signed/authorized.

**To submit this filing**

- You must be holding the filing and must have the Plan Administrator, PA Representative or Filing Coordinator permission.
- The task list must indicate that the filing contains all required information.
- Each required signature/authorization on the task list must be completed.

**Filing Team** : Instructions

The filing coordinator can change permissions from the [plan page](#)

Name	Permissions	Phone	E-mail	
Jonny Doe	Preparer, Paying Agent	313-313-3333	jonnydoe@workemail.com	Route To
Jack Black	Actuary, View Account History, Filing Coordinator, Paying Agent, Plan Administrator, Preparer	123-123-1234	jblack@workemail.com	Holding

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# Review, Edit, Sign, and Route a Filing

## Approval for Comprehensive Filing Page

- Review the certification information that is displayed (e.g., this page is for a single-employer plan administrator).
- Review your personal information and make changes, if necessary.
- To approve the filing, enter your “Secret Answer” and select the “Approve Filing” button to go to the next screen.



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### Approval for Comprehensive Filing

Comprehensive Filing for Plan Year Commencing 1/1/2015  
Retirement Plan 4 – 55-6666666 / 777

#### Certification of Single-Employer Plan Administrator

[Instructions](#)

I certify under penalty of perjury, to the best of my knowledge and belief, that all the information in the filing is true, correct and complete and has been determined in accordance with the PBGC's premium regulations and instructions, except that if the filing reports an estimated premium funding target, the estimate is reasonable, takes into account the most current information available to the enrolled actuary, and has been determined in accordance with generally accepted actuarial principles and practices, and that if I received variable-rate premium information certified by an enrolled actuary for this filing, the variable-rate premium information in the filing is the same as the variable-rate premium information certified by the enrolled actuary.

#### Your Personal Information (To update this information, select the My Account link at the top of this page.)

First Name: Jack  
Last Name: Black  
Work Phone: 123-123-1234 Ext. 415  
Work E-mail: JBLACK@WORKEMAIL.COM

#### As an extra security precaution, we ask that you enter below the answer to your secret question before clicking Approve Filing

I understand that under the Government Paperwork Elimination Act ("GPEA") (Title XVII of Public Law No. 105-277), my answer to my secret question will be deemed the equivalent of my handwritten signature and as binding under 18 U.S.C. 1001 (dealing with false statements) as an inked signature.

Secret Question: What is your mother's maiden name?

\* Secret Answer:

Cancel Approve Filing



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# Review, Edit, Sign, and Route a Filing

## Filing Manger page – Sign Filing

- Use this page to sign the filing as Actuary.
- Select the “Sign” button as Actuary.
- ❖ The Approval for Comprehensive Filing Page will be displayed (Slide 10).

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LAUNCH PAGE
HOME
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My Account
Logout

**Step 2: Edit Draft, Sign Filing, and Select Payment Alternative**  
 Comprehensive Filing for Plan Year Commencing 1/1/2015  
 Retirement Plan 4 – 55-6666666 / 777

**Filing Manager**

This Filing Has **NOT** Been Submitted Go to Plan Page

### Filing Status

Filing is: **not ready for submission** (refer to 'To submit this filing' below)

You are holding the filing

### Filing Task List

➤ Instructions

View/Edit Filing	✓ This filing contains all the required information; however, a complete filing does not necessarily indicate that there are no errors. To review warning messages related to common mistakes, click the View button.	Delete Filing
Sign	✓ <b>Plan Administrator or PA Representative e-signature completed</b> 11:21 AM, 4/7/2015 Eastern Time Sign as Actuary	
Authorize	Authorize as Paying Agent	

**To take action on this filing:**

- You must be holding the filing (otherwise, only 'View Filing' is available). Tasks listed reflect your permissions for this plan. Permissions are listed in the Filing Team section below.
- Note: If a change is made that affects the amount due or variable-rate premium information, any signatures/authorizations will be removed. The filing will need to be re-signed/authorized.

**To submit this filing**

- You must be holding the filing and must have the Plan Administrator, PA Representative or Filing Coordinator permission.
- The task list must indicate that the filing contains all required information.
- Each required signature/authorization on the task list must be completed.

### Filing Team

➤ Instructions

The filing coordinator can change permissions from the [plan page](#)

Name	Permissions	Phone	E-mail	Route To
Jonny Doe	Preparer, Paying Agent	313-313-3333	jonnydoe@workemail.com	Route To
Jack Black	Actuary, View Account History, Filing Coordinator, Paying Agent, Plan Administrator, Preparer	123-123-1234	jblack@workemail.com	Holding

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# Review, Edit, Sign, and Route a Filing

## Approval for Comprehensive Filing Page

- Review the certification information that is displayed (e.g., this page is for Filing Summary).
- Enter The Actuary Information.
- Review your personal information and make changes, if necessary.
- To approve the filing, enter your “Secret Answer” and select the “Approve Filing” button to go the next screen.

**PBGC My PAA**

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### Approval for Comprehensive Filing

Comprehensive Filing for Plan Year Commencing 1/1/2015  
Retirement Plan 4 – 55-6666666 / 777

Filing Summary	
VRP cap qualification:	N/A
UVB valuation date:	1/1/2015
Premium funding target is an estimate:	Not Checked
Premium funding target method:	Standard
Discount Rates:	Segment rates
Segment Rates:	
1st Segment:	6.00%
2nd Segment:	5.50%
3rd Segment:	4.50%
Premium funding target:	\$6,300.00
Market value of assets:	\$2,000.00
Unfunded Vested Benefits:	\$5,000.00
Variable-rate Premium:	\$120.00

**Certification of Enrolled Actuary** [-> Instructions](#)

I certify under penalty of perjury, to the best of my knowledge and belief, that the variable-rate premium information in the filing is true, correct and complete and has been determined in accordance with PBGC's premium regulations and instructions; except that if the premium funding target is estimated, the estimate is reasonable, takes into account the most current information available to me and has been determined in accordance with generally accepted actuarial principles and practices.

**Actuary Information**

Please fill out the following information.  
An asterisk(\*) indicates a required field.

\*Enrollment Number:

Firm:

**Your Personal Information** (To update this information, select the My Account link at the top of this page.)

First Name: Jack  
Last Name: Black  
Work Phone:  (ex. 111-111-1111) Ext.  (ex. 111111)  
Work E-mail: JBLACK@WORKEMAIL.COM

**As an extra security precaution, we ask that you enter below the answer to your secret question before clicking Approve Filing**

I understand that under the Government Paperwork Elimination Act ("GPEA") (Title XVII of Public Law No. 105-277), my answer to my secret question will be deemed the equivalent of my handwritten signature and as binding under 18 U.S.C. 1001 (dealing with false statements) as an inked signature.

Secret Question: What is your mother's maiden name?  
\* Secret Answer:

# Review, Edit, Sign, and Route a Filing

## Filing Manager Page – Route Filing

- Use this page to route the filing to another Filing Team member, if needed (e.g., to sign the filing).
- Select the “Route to” button next to the person(s) name.
- The “Route Filing” page will be displayed (Slide 12).

Note: The check marks in the Filing Task List section show that the filing has all the required information and the PA/PA Rep has signed the filing.

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**Step 2: Edit Draft, Sign Filing, and Select Payment Alternative**  
 Comprehensive Filing for Plan Year Commencing 1/1/2015  
 Retirement Plan 4 – 55-6666666 / 777

**Filing Manager**

This Filing Has **NOT** Been Submitted [Go to Plan Page](#)

**Filing Status**

Filing is: **not ready for submission** (refer to 'To submit this filing' below)  
 You are holding the filing

**Filing Task List** [Instructions](#)

<a href="#">View/Edit Filing</a>	✓ This filing contains all the required information; however, a complete filing does not necessarily indicate that there are no errors. To review warning messages related to common mistakes, click the View button.	<a href="#">Delete Filing</a>
	✓ Plan Administrator or PA Representative e-signature completed 11:21 AM, 4/7/2015 Eastern Time	
	✓ Enrolled Actuary e-signature completed 11:26 AM, 4/7/2015 Eastern Time	
<a href="#">Authorize</a>	Authorize as Paying Agent	

**To take action on this filing:**

- You must be holding the filing (otherwise, only 'View Filing' is available). Tasks listed reflect your permissions for this plan. Permissions are listed in the Filing Team section below.
- Note: If a change is made that affects the amount due or variable-rate premium information, any signatures/authorizations will be removed. The filing will need to be re-signed/authorized.

**To submit this filing**

- You must be holding the filing and must have the Plan Administrator, PA Representative or Filing Coordinator permission.
- The task list must indicate that the filing contains all required information.
- Each required signature/authorization on the task list must be completed.

**Filing Team** [Instructions](#)

The filing coordinator can change permissions from the [plan page](#)

Name	Permissions	Phone	E-mail	
Sue Practitioner	Plan Administrator, Paying Agent, Preparer	202-326-4000	spractitioner@workemail.com	<a href="#">Route To</a>
Jack Black	Actuary, View Account History, Filing Coordinator, Paying Agent, Plan Administrator, Preparer	123-123-1234	jblack@workemail.com	Holding

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# Review, Edit, Sign, and Route a Filing

## Route Filing Page

- This page describes that the filing will be routed to the selected Filing Team member.
- You have the option to include an additional short message.
- Select the “Route Filing” button to initiate the routing.



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### Route Filing

#### Route Filing To: Sue Practitioner

This message will be sent to Sue Practitioner

The 2015 Comprehensive Premium Filing for Retirement Plan 4 (55-6666666/777) has been routed to you by Jack Black for your input. To open the filing, log in to My PAA by clicking the following link.

<http://www.pbgc.gov/mypaa/login.aspx>

If this link does not respond, re-type it (or copy and paste it) into your browser's address window. If you still experience difficulty, call the PBGC Contact Center at 1-800-736-2444

If you would like to include an additional message to be sent on your behalf (up to 256 characters), type it in the text box below:

Note: This process could take a while to complete. Only select the "Route Filing" button once or you will encounter an error.

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# Review, Edit, Sign, and Route a Filing

## Routing Confirmation Page

- This page confirms that the filing has been routed and the instructions email has been sent.
- Select the “Go to Your Home Page” button to see updated information (Slide 14).



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## Routing Confirmation

Sue Practitioner has been sent an e-mail on your behalf with instructions to log in to My PAA in order to review and approve the filing.

You can track the progress of this filing from the appropriate plan page.

[Go to Your Home Page](#)

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# Review, Edit, Sign, and Route a Filing

## Home Page

- Your Home Page reflects the following updates for the routed filing that continues to show in the “In-Process Filings” section:
  - ❖ The number of filings that you hold has reduced by one.
  - ❖ The number of filings held by others has increased by one.
  - ❖ The name of the person holding the filing has changed.
- Select the appropriate link/button to logout of My PAA or to go to another page (e.g., the Launch Page).

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**Welcome, Jack Black!**

**LAUNCH PAGE** HOME PLANS ▾ FILINGS ▾ HELP My Account Logout

### Home Page

#### Quick Links

- Add Plan
- Create Filing
- Import Filing
- Upload Filing

#### Right Now

- 4 Filings Count (In-Process)
- 3 You Hold
- 1 Others Hold
- 6 Plans Count

#### In-Process Filings

[View all In-Process Filings >](#) [Instructions](#) Clear Sort

Filing	Last Routed	Plan Name	EIN/PN	Held By
2015 Comprehensive		My Retirement Pension Plan	88-8888888 / 750	Jack Black
2015 Comprehensive		Retirement Plan1	11-2222222 / 123	Jack Black
2015 Comprehensive		Retirement Plan2	22-3333333 / 444	Jack Black
2015 Comprehensive	04/09/2015	Retirement Plan 4	55-6666666 / 777	Sue Practitioner

#### Plans in Jack Black's Account

[View all Plans >](#) [Instructions](#)

Search
Clear Search

Plan Name	EIN/PN	Actions
Pension Plan1	44-1111111 / 444	Create a Filing Invite a Practitioner
Retirement Plan 4	55-6666666 / 777	Create a Filing Invite a Practitioner
Retirement Plan1	11-2222222 / 123	Create a Filing Invite a Practitioner
Retirement Plan2	22-3333333 / 444	Create a Filing Invite a Practitioner
Retirement Plan3		Create a Filing Invite a Practitioner
Retirement Plan5	88-8888888 / 750	Create a Filing Invite a Practitioner

#### Import Software-Prepared Filing(s)

[Instructions](#)