

## GOVFORMS®

The **BLAZE SSI GOVFORMS** system generates DOL/EBSA/EFAST approved 'Machine Print' bar-coded series 5500 forms, complete with associated schedules. SAR and PBGC forms are included in the 5500 forms package. 5300 forms and 1099 forms are optional.

### 1. APPLICATION FEATURES

- + Series 5500 forms approved by EFAST (DOL/EBSA); PBGC forms approved by PBGC
- + **PDFShare** (optional): Email forms to plan sponsor for review or electronic completion
- + Automatic calculation of "totals" fields
- + Minimal annual input with "Update From Prior Year" feature
- + Database provided to enter, edit and store and retrieve data
  - No need for duplicate data entry for more than one form
  - Print forms and schedules for a user-created list of plan sponsors (optional)
- + PBGC and 5300 Forms may be updated from 5500 Forms data
- + 'Cloning' of data speeds input of new plans
- + Edit and print multiple Schedules and pages
- + Preparation of SAR with data automatically pre-filled from 5500 form
- + 5500 Forms and PBGC Forms 'Edit check' provided to avoid common filing errors

### 2. USER INTERFACE

- + Easy and familiar Windows user interface with full graphical representation of the form
- + Supports field style and entries that match government instructions
- + Supports automatic cross-form population of shared field information
- + Includes documentation bookmarks for each form field
- + Provides zoom control and other viewing options
- + Provides 'Find' icon to search form and instructions
- + Provides user control of calculations
- + Supports partial completion of forms including calculated fields, if desired
- + Provides instant access notes highlighting complex form regions
- + At the user's option, all forms data can be maintained in an ODBC compatible database
- + Supports 'import' of data, including files from other forms systems
- + Electronic data interface with **BLAZE SSI EBP Valuation and Plan Term Systems**
- + Introductory Guide and comprehensive on-line 'HELP' documentation

### 3. CUSTOMER SUPPORT

- + System updates for government regulations included in maintenance service
- + Unlimited phone, fax and email HelpLine support included in maintenance service
- + National and regional user seminars
- + Basic and customized training seminars
- + Systems consulting and custom programming available

### 4. OPERATING ENVIRONMENT SUPPORTED

- + MS Windows XP Professional or MS Vista (Business or Ultimate) Operating System
- + Computer sufficient to support the OS; plus 128MB RAM (or higher) for the application
- + MS Internet Explorer 5.5 or higher; Internet connection required
- + Free Adobe Reader version 6 or higher

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## Forms Included in each Series

### GOVFORMS Series 1: EFAST/DOL, SAR and PBGC Forms

**Form 5500 Series:** 5500

5500-EZ

5500 Schedules A, B, C, D, E, G, H, I, R, SB, MB and SSA

As necessary, print multiple Schedule A, C-pg 2, D-pg 2&3, SSA-pg 2

5558

DB Plan Annual Funding Notice

5500 Form Edit Check (Highlights missing or inconsistent user entries)

**SAR:**

Summary Annual Report fully integrated with 5500 Forms;  
for Pension and Welfare Plans

**PBGC Forms:**

Comprehensive Premium Filing; Form 1-ES (E-filing)

Form 1; Form 1-EZ; Form 1 Schedule A (available for years prior to 2009)

Form 10, Advance Notice and Post-Event Notice of Reportable Events

Form 500, Schedule EA-S, REP-S

Form 501, Schedule MP, Attachments A, B, and Payment Voucher

Notice of Plan's Funding Level

PBGC Form Edit Check (Highlights missing or inconsistent user entries)

**PBGC premium payment files approved by PBGC for e-filing via MyPAA.**

### GOVFORMS Series 2: IRS 5300 Series Forms (Optional)

**Form 5300 Series:** 2848, Power of Attorney

5300, Application for Determination for Employee Benefit Plan

5307, Application for Determination (Master/Prototype/Volume Submitter)

5310, Application for Determination for Terminating Plan

5330, Return of Excise Taxes

6088, Distributable Benefits (employees automatically sorted in IRS order)

6406, Short Form Application for Determination of Minor Amendment

8717, User Fee for Employee Plan Determination Letter Request

Schedule Q, Non-discrimination Requirements

Notice to Interested Parties

SS-4

### GOVFORMS Series 3: IRS 1099-R Series Forms (Optional)

1099-R, 1096

945

The optional IRS 1099-R Series supports the calculation of PS58 costs for each insured participant of a qualified plan using either government PS58 rates or user-defined term rates. It tracks cumulative PS58 costs for individual policies from year to year. Processing may be done plan by plan or via a batch function.

The system prints the required forms to report PS 58 costs or other distributions to participants. Plan, Employee, Policy, and Data reports are included.

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