

GOVFORMS®

The **BLAZE SSI GOVFORMS** system supports preparation and transmission of forms required for qualified pension and welfare benefit plans. DOL/EFAST2-approved forms, IRS forms and PBGC-approved forms and attachments are available.

1. APPLICATION FEATURES

Filing Preparation System supports creation/editing of EFAST2-approved electronic filing format for 5500 and 5500-SF forms, schedules and attachments; plus related IRS forms and PBGC premium payment forms. The system offers a secure and efficient workflow, using a combination of PC- and web-based software. 'Batch' processing is supported.

Filing Transmission (Tx) System supports the notification of filing signers, secure capture of electronic signatures and a secure database to track filing uploads, submission status and DOL response. This system is included with the Filing Preparation System.

IRS 5300 Forms: 5300 and related forms. See reverse for specific forms included. This is a separate system.

Plan Termination Forms: IRS and PBGC forms related to plan terminations. See reverse for specific forms included. This is a separate system.

IRS 1099-R and 1096 Forms: See reverse for specific forms included. This is a separate system.

2. USER INTERFACE

- + Easy and familiar Windows user interface
- + Introductory Guides and Webcasts
- + Automated data validation and entry error trapping
- + Electronic interface with **BLAZE SSI EBPII** System
- + Electronic interface with **McKay Hochman DOCMAN®** System
- + Import data from DOL/IFILE or from vendors' software

3. CUSTOMER SUPPORT

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

4. OPERATING ENVIRONMENT SUPPORTED

- + MS XP Professional, Vista Business, or Windows 7 Professional Operating System
- + Fully-managed .NET 4.0 application technology
- + Computer sufficient to support the OS; plus 1GB RAM (or higher) for the application
- + MS Internet Explorer 8 or higher; Internet connection required
- + Free Adobe Reader version 6 or higher [for 5300 forms only, Acrobat version 6 or higher]

GOVFORMS®

Filing Preparation (EFAST2 Prep) System

EFAST2-approved electronic 5500 and 5500-SF forms

Prepare, edit and review EFAST2-approved electronic 5500 and 5500-SF forms
En masse import of data from the McKay Hochman DOCMAN System
Cross-Field/Cross-Form validation according to DOL-specified EFAST2 criteria
Immediate validation/messaging of user-input within form
Add, edit, review, import and export Schedules; Add and view Attachments
Create EFAST2-approved electronic filing file for submission to EFAST2
Create, view and save PDF version of EFAST2 filing

Create and edit IRS 5500-EZ, 5558 and 8955 SSA

Create and edit DB Plan Annual Funding Notice

Create and edit Summary Annual Report (SAR)

Prepare PBGC-approved premium payment files for e-filing via MyPAA:

Comprehensive Premium Filing; Form 1-ES (E-filing)
Form 10, Advance Notice and Post-Event Notice of Reportable Events
PBGC Form Edit Check (Highlights missing or inconsistent user entries)

Filing Transmission (EFAST2 Tx) System (Included with Filing Preparation System)

Receives upload of EFAST2 filing file from Filing Prep System
Notifies signers of availability of filing and presents PDF-version of filing to signers
Supports web-based messaging between signers and forms preparers
Supports secure capture of one or more electronic signatures
Supports submission of single or multiple filings to EFAST2 web service
Supports secure database to track activity, submission status and DOL response

IRS 5300 and related Forms (Available separately – requires Acrobat ver. 6 or higher)

5300, 5307 Application for Determination
5310, Application for Determination for Terminating Plan
5330, Return of Excise Taxes
6088, Distributable Benefits
8717, User Fee for Employee Plan Determination Letter Request
Schedule Q, Non-discrimination Requirements
2848, Power of Attorney
SS-4, Application for Employer Identification Number

Plan Term Forms (Available separately)

5310, Application for Determination for Terminating Plan
6088, Distributable Benefits
Form 500/501: Form 500, Schedule EA-S, REP-S, Form 501
PBGC Schedule MP, Attachments A, B, and Payment Voucher

IRS 1099-R Forms (Available separately)

1099-R, 1096, 945; Optional form 945-A
Calculate PS58 costs for each insured participant of a qualified plan using either government PS58 rates or user-defined term rates. Track cumulative PS58 costs for individual policies from year to year. Plan or batch processing is supported.