

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.

Form 1099-R Filing System: 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

- + Up-to-date MS Windows Operating System and IE browser
- + Internet connection required; free Microsoft.NET 4.0 framework
- + Computer sufficient to support the OS; plus 1GB RAM (or higher) for the application
- + Up-to-date, free Adobe Reader [for 5300 forms only, Acrobat version 6+]

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BLAZE SSI® * Box 333 * Brielle, NJ 08730
Telephone 732-223-5575 * Fax 732-223-6683 * Email sales@blazessi.com

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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
Printable Cross-Field/Cross-Form validation using DOL-specified EFAST2 criteria
Immediate validation/messaging of user-input within form
Add, edit, review, import and export Schedules; including SB and MB
Add and View Attachments

Create EFAST2-approved electronic filing file for submission to EFAST2

Create, view and save PDF version of EFAST2 filing

Create/Edit IRS 5500-EZ and 5558

Create/Edit IRS 8955 SSA; for electronic filing or preparation of PDF form

Create/Edit DB Plan Ann Funding Notice; Summary Ann 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

Form 1099-R Filing System (Available separately)

IRS 1099-R, 1096 and 945 Forms

Support for electronic filing of 1099-R using IRS FIRE (combined Federal and State)

Link to outside data sources using CSV file in specified format

Link to BLAZE SSI EBPII System

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