IRS

Pension Plan Burden Survey

Web Survey Instructions

1. **Go to the website.**
   To take the survey online, please go to: **www.IRS-PPBSurvey.org**
2. **Log in.**
   You will need the following PIN to access the survey: **PIN: [PIN]**

- The individual most responsible for filing the federal pension plan annual return should complete the survey. This is usually the plan sponsor.
- Please feel free to consult with others to complete the survey.
- Please do not forward this survey information to your third-party service provider.
- We estimate it will take about 10 to 15 minutes to complete the survey.

Questions? Flip this page over to see answers to Frequently Asked Questions.

If you have any technical difficulties, including problems with the website, please call 855-828-6291 or send an email to IRS-PPBSurvey@westat.com.

If you would like to contact someone at the IRS, please email Scott Leary at Scott.P.Leary@irs.gov.

We hope you will take the time to complete this important survey. Thank you.

PPB

Pension Plan Burden Survey

Frequently Asked Questions

What is the Pension Plan Burden Survey?
This survey is about the time and out-of-pocket costs pension plan sponsors (including one-participant owners) spent to comply with their Plan Year 2017 federal pension plan reporting requirements (Forms 5500, 5500-EZ, and 5500-SF). This information will be used to better understand and estimate the burden faced by pension plan sponsors.

Who should complete this survey?
The individual responsible for filing the federal pension plan annual return should complete this survey, even if the return was prepared by someone else. This is usually the plan sponsor. Feel free to consult with others to complete this survey, but please do not forward this survey to your third-party service providers.

If you serve as a sponsor for more than one pension plan, please see the address on the cover letter to determine which pension plan this survey applies to. We will refer to this plan as the “pension plan” throughout the survey.

What does “Plan Year 2017 federal pension plan annual return” refer to?
Plan Year 2017 federal pension plan annual return refers to Form 5500, 5500-EZ, or 5500-SF, as well as any related forms, schedules, and worksheets.

How was I selected for this survey?
You were randomly selected from all plan sponsors who filed a Form 5500, 5500-EZ, or 5500-SF for Plan Year 2017.

How will my answers be used?
Please be assured that your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities.

Why should I participate?
While participation is voluntary, information about your pension plan reporting experience will help the IRS better understand and estimate the burden imposed by pension plan reporting requirements. We encourage you to take a few minutes of your time to participate.

How long will this survey take?
This survey should take 10 to 15 minutes to complete, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information.

Who can I contact with questions?
If you have questions about the content of this survey please call Dawn Nelson at Westat by phone at 855-828-6291 or send an email to IRS-PPBSurvey@westat.com. If you would like to contact someone at the IRS, please email Scott Leary at Scott.P.Leary@irs.gov. To read the official IRS announcement regarding this survey, please visit the following URL on the IRS website: https://www.irs.gov/statistics/2017-pension-plan-burden-survey.

Privacy and Paperwork Reduction Act Notice for Pension Plan Burden Data Collection

The Privacy Act of 1974 states that when we ask you for information, we must first tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if you do not provide it and whether or not you must respond under the law.

Our legal right to ask for this information is 5 U.S.C. 301.

The primary purpose for requesting the information is to analyze the role of taxpayer burden in tax administration. We will also use the information to fulfill the IRS' statutory obligations to the Office of Management and Budget and Congress for information required by the Paperwork Reduction Act, and to provide tax policy analysis support to the Office of Tax Analysis at the Department of the Treasury. We will also use the information provided to better understand taxpayer needs and burden reduction opportunities.

Tax information may be disclosed only as provided by 26 U.S.C. 6103. Providing the information is voluntary. Not providing all or part of the information requested may reduce our ability to address taxpayer concerns regarding paperwork reduction.

OMB No: 1545-2212. This report is authorized under the Paperwork Reduction Act. Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities. The information that you provide will be protected to the fullest extent allowable under the Freedom of Information Act (FOIA). Public reporting burden for this collection of information is estimated to average 10 to 15 minutes, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Ave. NW, Washington, DC 20224.