

SURVEY RESEARCH CENTER
THE UNIVERSITY OF MICHIGAN

SURVEY OF CONSUMER FINANCES
EMPLOYER SPONSORED PENSION BENEFIT PLANS

PENSION PROVIDER COVERSHEET
COMMON COVERAGE BY PLAN COMBINATIONS

PENSION PROVIDER

PPID:

SEQ# PLAN# PLAN NAME

COMMON COVERAGE BY SEQ# COMBINATIONS

1.

PPID:
SEQ# COMBINATION:

***CHECK WHETHER METHOD A OR B IS USED TO DEFINE HOW BENEFITS FROM EACH OF THE SEPARATE PLANS LISTED ABOVE ARE COMBINED TO DETERMINE TOTAL BENEFITS.

A. The formulas coded in each SEQ# listed above are used to first calculate the benefits for which participants are eligible under the separate plans; total benefits are the sum of the benefits payable by each plan.

B. The benefit formulas for one or more of the SEQ#s listed above depend on benefits participants are eligible to receive from one of the other plans listed above.

Enter below the SEQ# of the document used to define how the separate plans are integrated. Use the SEQ# which only appears in the plan combination listed above or use a new SEQ#.

SEQ#: _____ CHECK IF NEW SEQ#

PPID:

*** Enter below the total number of SEQ#s associated with this PPID, and list the specific documents coded for each SEQ#.

A. Total Number of SEQ#s:

SEQ#	Check Documents Coded			
B. <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	PART I	PART II	PART III	NONE
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	PART I	PART II	PART III	NONE
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	PART I	PART II	PART III	NONE
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	PART I	PART II	PART III	NONE
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	PART I	PART II	PART III	NONE
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	PART I	PART II	PART III	NONE

*** Record below any unusual characteristics of the pension plan(s) offered by this PPID, or any information needed to integrate benefits across two or more separate SEQ#s. (ATTACH EXTRA PAGES IF NECESSARY.)