

Publications

Agencies Propose Significant Changes to Form 5500 Annual Reporting

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On Monday, July 11, 2016, the Department of Labor (“DOL”), the Internal Revenue Service (“IRS”), and the Pension Benefit Guaranty Corporation (“PBGC”) (collectively, the “Agencies”) proposed revisions to the forms and regulations governing the Form 5500 annual reporting process for employee benefit plans (“Proposed Revisions”). These Proposed Revisions, if implemented, would be the most significant overhaul of the Form 5500 since the Agencies’ last Form 5500 update, effective with the 2009 plan year (the “2009 Update”). The revisions would affect employee pension and welfare benefit plans, plan sponsors, administrators, and service providers to plans (including recordkeepers and trustees) subject to annual reporting requirements under the Employee Retirement Income Security Act (“ERISA”) and the Internal Revenue Code (“Code”).

Please see the attached memo for further information.

[Agencies Propose Significant Changes to Form 5500 Annual ReportingDownload](#)