

News Release



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Labor Department Releases Form 5500 Annual Report And Filing Requirements

WASHINGTON – The U.S. Department of Labor’s Employee Benefits Security Administration (EBSA), the Internal Revenue Service (IRS) and the Pension Benefit Guaranty Corporation (PBGC) today announced the release of the 2004 Form 5500.

Ann L. Combs, Assistant Secretary of EBSA said, “We are committed to making the Form 5500 filing process as smooth as possible for plans and their service providers. As part of that commitment, we are making the forms and instructions available much earlier this year than we have in previous years.”

The Form 5500 and Form 5500-EZ for plan year 2004 are essentially unchanged from 2003. Minor modifications have been made and are highlighted in the 2004 Instructions. Of particular importance, 2004 filings may be rejected if they include social security numbers on the form or any attachment that is open to public inspection.

Information copies of the forms, schedules and instructions are available on EBSA’s web site at www.efast.dol.gov. Filers should monitor the EFAST web site for information on approved software vendors for completing the 2004 forms and on the availability of the official, government printed forms.

Filers may contact the EFAST Help Line for general assistance by calling 1-866-463-3278.

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