

2021 5500 Forms and Schedules

Form/Schedule

Federal

Form 5500: Annual Return/Report of Employee Benefit Plan

Form 5500-EZ: Annual Return of One Participant (Owners and Their Spouses) Retirement Plan

Form 5500-SF: Short Form Annual Return/Report of Small Employee Benefit Plan

Form 5558: Application for Extension of Time to File Certain Employee Plan Returns

Form 8955-SSA: Annual Registration Statement Identifying Separated Participants with Deferred Vested Benefits

Schedule A: Insurance Information

Schedule C: Service Provider Information

Schedule D: DFE/Participating Plan Information

Schedule G: Financial Transaction Schedules

Schedule H: Financial Information

Schedule I: Information - Small Plan

Schedule MB: Multi-Employer Defined Benefit Plan and Certain Money Purchase Plan Actuarial Information

Schedule R: Retirement Plan Information

Schedule SB: Single-Employer Defined Benefit Plan Actuarial Information

Comparison of Current to Prior Year

Filing Instructions

Footnotes

Summary Annual Report

Transmittal Letters