

2021 5500 E-file PDF Filenames

Federal

Recommended PDF Description

Required PDF Description

Recommended PDF Filename

Required PDF Filename

Form 5500 / 5500-SF: Signature and Date - Manually signed Form 5500 or 5500-SF under e-signature opt

Form 5500 / 5500-SF: Administrative Penalties - Reasonable Cause for late filing

Form 5500 / 5500-SF: Administrative Penalties - Reasonable Cause for late or missing IQPA Report

Form 5500 / 5500-SF: Line A -Multiple Employer - Participating employer information for multiple employer plans required by The Cooperative and Small Employer Charity Pension Flexibility Act (CSEC).

Schedule A Line 6a Statement of Basis of Premium Rates

Schedule C Part III Termination Information on Accountants and Enrolled Actuaries

Schedule G Part I Overdue Loan Explanation

Schedule G Part II Overdue Lease Explanation

Schedule H Line 4a Delinquent Participant Contributions

Schedule H Line 4i Schedule of Assets (Acquired and Disposed Of Within Year)

Schedule H: Line 3c - IQPA report

Schedule H: Line 4i - Schedule of Assets (Held at End of Year)

Schedule H: Line 4j - Schedule of Reportable Transactions

Schedule I Line 4a Delinquent Participant Contributions

Schedule I: Line 4K - 2520.104-50 Statement

2021 5500 E-file PDF Filenames

Schedule I: Line 4k - IQPA report

Schedule MB 2015 Line 8b(1) Projection of Expected Benefit Payments

Schedule MB Line 4c Progress Under Funding Improvement or Rehabilitation Plan

Schedule MB Line 6g Estimated Investment Return on Actuarial Value of Assets

Schedule MB Line 6h Estimated Investment Return on Current Value of Assets

Schedule MB Line 9f Actuarial Prior Year Credit Funding Deficiency

Schedule MB: Line 11 - Justification for Change in Actuarial Assumptions

Schedule MB: Line 4a - Actuarial Certification

Schedule MB: Line 4a - Illustration Supporting Actuarial Certification of Status

Schedule MB: Line 6 - Actuarial Assumption Methods

Schedule MB: Line 6 - Summary of Plan Provisions

Schedule MB: Line 8b - Active Participant Data

Schedule MB: Lines 9c / 9h - Schedule of Funding Standard Account Bases

Schedule MB: Statement by Enrolled Actuary - Actuary has not fully reflected any regulation or ruling. See "Statement by Enrolled Actuary" section of the Form 5500 Schedule MB Instructions for additional information.

Schedule MB: Statement by Enrolled Actuary - Signed Schedule MB. See "Statement by Enrolled Actuary" section of the Form 5500 Schedule MB Instructions for additional information

2021 5500 E-file PDF Filenames

Schedule R Line 13d Collective Bargaining Agreement

Schedule R Line 13e Contribution Rate Information

Schedule R: Line 17 - Assets Liability Transfer

Schedule R: Line 18 - Multiple Plan Liabilities

Schedule R: Part V - Funding Improvement Plan

Schedule R: Part V - Schedule R Rehabilitation Plan

Schedule SB Line 15 Reconciliation of AFTAP Calculation

Schedule SB Line 19 Discounted Employer Contributions

Schedule SB Line 20c Liquidity Requirement Certification

Schedule SB Line 22 Weighted Average Retirement Age

Schedule SB Line 23 Information on Use of Multiple
Mortality Tables

Schedule SB Line 27 Delayed Funding Rules Relief

Schedule SB Line 27 Pre-PPA Funding Rules

Schedule SB Line 7 Explanation of Discrepancy in Prior Year
Funding Standard Carryover Balance or Prefunding Balance

Schedule SB Line 8 Late Quarterly Installments

Schedule SB Line 9 Explanation of Credit Balance Discrepancy

Schedule SB Line E Information for Each Individual Employer

Schedule SB: Line 23 - Actuarial Assumption Methods

Schedule SB: Line 23 - Information on Use of Substitute
Mortality Tables

Schedule SB: Line 24 - Change in Non-Prescribed Actuarial
Assumptions

Schedule SB: Line 25 - Method Change

2021 5500 E-file PDF Filenames

Schedule SB: Line 26 - Active Participant Data

Schedule SB: Line 27 - Alternative 17 - Year Funding
Schedule for Airlines

Schedule SB: Line 27 - Balances Subject to Binding
Agreement with PBGC

Schedule SB: Line 32 - Schedule of Amortization Bases

Schedule SB: Line 4 - Plan at Risk

Schedule SB: Part V - Summary of Plan Provisions

Schedule SB: Statement by Enrolled Actuary - Actuary has not fully reflected any regulation or ruling. See "Statement by Enrolled Actuary" section of the Form 5500 Schedule MB Instructions for additional information.

Schedule SB: Statement by Enrolled Actuary - Signed Schedule MB. See "Statement by Enrolled Actuary" section of the Form 5500 Schedule MB Instructions for additional information