

2024 5500 Federal E-filed Forms

Form/Schedule	E-file	E-file Notes
Form 5500: Annual Return/Report of Employee Benefit Plan	✓	1 per return
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	✓	1 per return
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	✓	Required if 250+
Schedule A: Insurance Information	✓	999 per return
Schedule C: Service Provider Information	✓	1 per return
Schedule D: DFE/Participating Plan Information	✓	1 per return
Schedule G: Financial Transaction Schedules	✓	1 per return
Schedule H: Financial Information	✓	1 per return
Schedule I: Information - Small Plan	✓	1 per return
Schedule MB: Multi-Employer Defined Benefit Plan and Certain Money Purchase Plan Actuarial Information	✓	1 per return
Schedule R: Retirement Plan Information	✓	1 per return
Schedule SB: Single-Employer Defined Benefit Plan Actuarial Information	✓	1 per return
Structured Attachment - Schedule MB, line 3(d) Withdrawal Liability Amounts	✓	
Structured Attachment - Schedule MB, line 8b(1) Schedule of Projection of Expected Benefit Payments	✓	
Structured Attachment - Schedule MB, line 8b(2) Schedule of Active Participant Data	✓	
Structured Attachment - Schedule MB, line 8b(3) Schedule of Projection of Employer Contributions and Withdrawal Liability Payments	✓	
Structured Attachment - Schedule SB, line 26a Schedule of Active Participant Data	✓	
Structured Attachment - Schedule SB, line 26b Schedule of Projection of Expected Benefit Payments	✓	