

2024 5500 Federal Forms Status

We have included the following forms in this release. Please note the status of each form in the Status column.

✓ Released as final in the tax application; ready for filing

↻ Continuous use forms; ready for filing

Blank Drafts or rolled over forms from last year; use caution when filing

Form	Status
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	✓
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	✓