

Federal

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule

Requirement(s) to Print

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