Go to 5500 Forms.

09/11/2024 3:38 pm CDT

After selecting a Plan from the "Home" screen and by clicking on "Edit Plan", the user will be directed to the "Edit Plan" screen. In the "Plan Modules" box, the user will be able to select the 5500 Plan Year (1988 - present) the user would like to work on before clicking the "5500 Forms" button.

The screen shown below displays what it looks like if the user has an IRS Forms, 5500, 1099, Portal and Distributions subscriptions with ftwilliam.com. Depending upon the subscription(s) the user has with ftwilliam.com, the "Edit Plan" screen may appear differently.