

Enter Information on a Form 5500 schedule

09/11/2024 3:41 pm CDT

To enter information in a schedule, click on the schedule under the "DRAFT - EDIT" heading in the "5500 - Year" box (or on the link under "Active Schedules" once you are already editing a form/schedule). The actual speed to open a form/schedule is dependent upon the speed of your Internet connection. If you are using a high-speed Internet connection, the schedule should open immediately.

Once the schedule is open you may enter data as you wish.

Wolters Kluwer

Return
Run Edit Checks
Clear Edit Checks

Active Schedules

Form 5500	???	Final
Schedule A-New P2	???	Final
Schedule A-New	???	
Schedule A-New P2	???	Final
Schedule C-New	???	Final
Schedule C-New	???	

Print All FINAL Schedules

Add Schedules
Form 5500-EZ
Form 5500-SF
Schedule A-New
Schedule C-New
Schedule D-New
Schedule G-New
Schedule H
Schedule I
Schedule MB
Schedule R-New
Schedule SB
Annual Funding Notice
Summary Annual Report
Form 5558

Form 5500
Department of the Treasury
Internal Revenue Service

Annual Return
This form is required t
and 4085 of the Emplo
sections 6057(b) a

Department of Labor
Employee Benefits Security
Administration

Pension Benefit Guaranty Corporation

General Informa
Begin/end year

Part I Annual Report Identification Informat
For calendar plan year 2022 or fiscal plan year beginning

A This return/report is for: a multiemployer plan
 Lines A-D a single-employer plan

B This return/report is: the first return/report
 an amended return/rep

C If the plan is a collectively-bargained plan, check here. . . .

D Check box if filing under: Form 5558
 special extension (enter

E If this is a retroactively adopted plan permitted by SECURE

Part II Ba Plan Information—enter all require

1a Name of plan
Example Company

Note that you can jump to different schedules and add schedules without having to return to the "Form 5500 - Year" screen (See red arrow above).