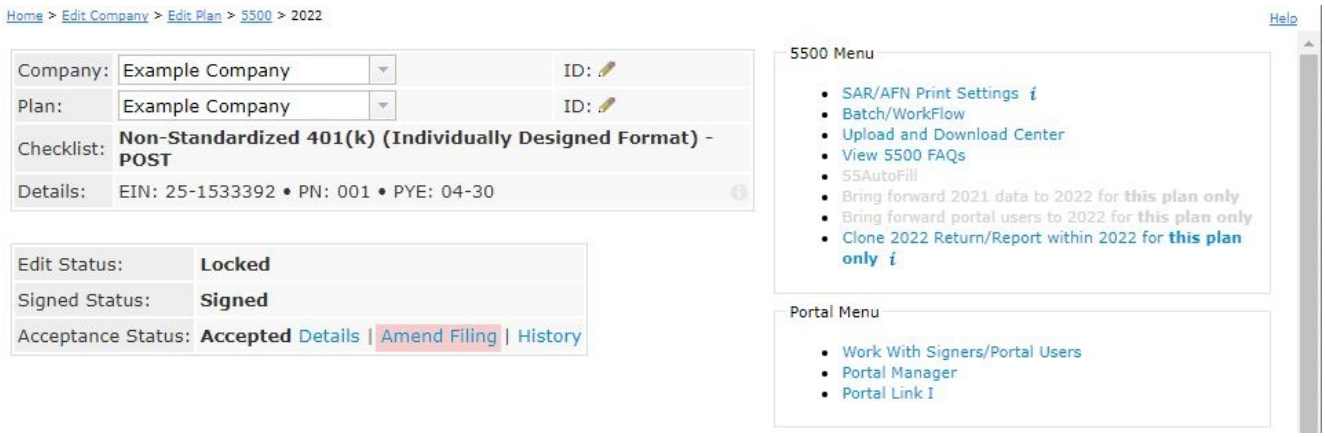
Amending a Filing Originally Filed through ftwilliam.com

09/22/2026 9:38 am CDT

To amend a filing, you will need to select "Amend Filing" next to the "Details" link on the "Acceptance Status" line.



Once you have clicked on "Amend Filing," a screen to confirm your selection will appear with the following warning:

Confirm

Click "Amend 5500" below to amend this Form 5500. Amending a 5500 will unlock the filing and allow changes to be made to all forms and schedules. Status checks will not be allowed until the amended filing has been submitted and you will no longer be able to check the status of the initial filing.

To continue, select "Amend 5500."

Before amending a filing, we would suggest ensuring you have a printed version of the prior filing for your records (there should already be a signed copy of the filing with your client). We would also suggest that you print a copy of the "Details," as once you click on "Amend Filing," you will lose the "Details" link.

Once you have clicked on "Amend Filing," the filing will be unlocked and you will be able to make any necessary changes.

All schedules and attachments from the original filing must be included with the amended filing; you will not only file the items that were amended.
Therefore, all items from the original filing, including the amended items, will be submitted to the DOL with the amended filing. Please see EFAST2 FAQ #Q4 for additional information.

If the filing was not submitted to the DOL originally through ftwilliam.com, you will prepare the filing as if you were preparing a new filing, but you will want to ensure you select the "Amended Return/Report" box on the Form 5500 and make any necessary changes to the filing. After running your edit checks, adding any attachments that are needed and adding your signer to the filing under "Work with Signers/Portal Users," you will lock the filing and invite your client to

sign. If you have the original DOL ACKID for the filing, prior to inviting your client to sign, you may provide ftwilliam.com with the ACKID and we will insert the ACKID into the schema of the filing so the amended filing will replace the original filing on the DOL's website. If you do not have the original ACKID this will not cause issues, there will just be two records for this filing on the DOL's website.