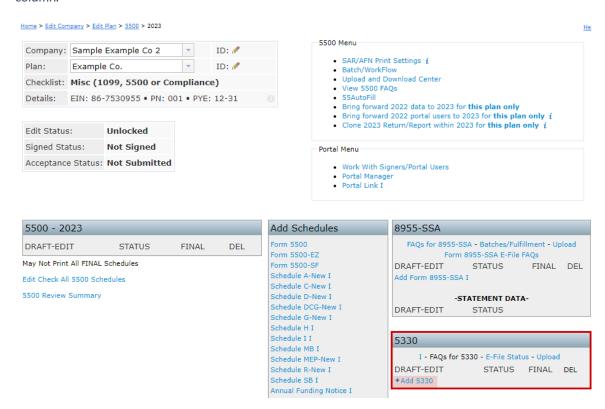
Adding Multiple 5330 Forms

02/03/2025 7:55 pm CST

To add Form 5330, begin by navigating to the 5500 Module for the specific plan year being filed. The 5330 option is located on the right side of the screen, under the 8955-SSA section. Select the **+Add 5330** link in the Draft-Edit column.



After clicking the **+Add** 5330 link, the form will be added to the plan year, and the system will redirect you to the draft screen for Form 5330. Any available indicative data will automatically populate in the first section of the form.

Once a single 5330 has been added to the plan, the option to add supplemental pages or attachments to the filing will be enabled and a new **+Add 5330** link will appear.

Please Note: The attachments link is only available for 5330 Add-On subscribers.



The software will automatically assign an identifier to each Form 5330 added (e.g., Form 5330 (1st), Form 5330

(2nd)). This identifier can be updated to any 5-characters by altering the description in the upper left-hand corner of the Form 5330 draft screen.



