

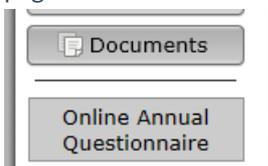
How Do I Complete the Online Annual Questionnaire?

12/04/2024 12:03 pm CST

1. To complete the Online Annual Questionnaire, you can either select the option from your ToDo list.

ToDo List	
ToDo	Days
Print and Review XYZ Company XYZ 401(k) Plan - 5500 - 2011	
Online Annual Questionnaire XYZ Company XYZ 401(k) Plan - Admin - 12/31/2012	0

2. Or by selecting your plan and clicking the 'Online Annual Questionnaire' link / button on the left side of the page.



3. If your plan administrator allows it, you may upload a file in response to the online annual questionnaire by clicking the 'Browse...' button to select your file and then the 'Upload File' button to upload the file. When completing the online annual questionnaire by uploading a file, anything you have entered in any of the fields in the online annual questionnaire will not be included in your response.

Online Annual Questionnaire Options	
Download / Print [No file selected]	Browse... Upload File

4. Otherwise, complete the questionnaire by filling in the appropriate data in each of the text fields.

XYZ Company XYZ 401(k) Plan Online Annual Questionnaire	
A. Company Information	
1. Name:	<input type="text"/>
2. Mailing Address:	<input type="text"/>
3. Business Type (C Corp, LLP, etc.):	<input type="text"/>
4. If the business is a sole proprietor, partnership, or LLC/LLP, is it taxed as a sole proprietor or partnership?	<input type="text"/>
5. EIN:	<input type="text"/>
6. Trust Identification Number:	<input type="text"/>
7. Fiscal Year End:	<input type="text"/>
8. Business Code (from corporate tax return /	<input type="text"/>
<input type="button" value="Submit"/>	

5. Your answers are saved as you enter them in the questionnaire.

6. After answering all the questions, complete the questionnaire by clicking the submit button at the bottom
