

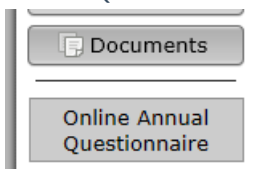
How Do I Download the Online Annual Questionnaire?

12/04/2024 12:03 pm CST

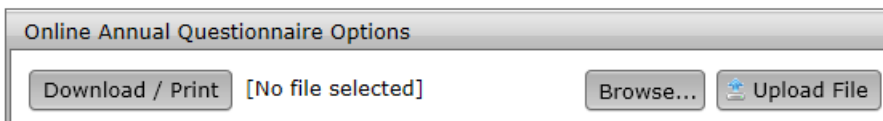
1. If you have not completed the Online Annual Questionnaire yet, you can select the option from your ToDo list.

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. Otherwise, you can get to the Online Annual Questionnaire by selecting your plan and clicking the 'Online Annual Questionnaire' link / button on the left side of the page.



3. If you have not completed the Online Annual Questionnaire yet, you can download a blank version of the online annual questionnaire to fill out by clicking the 'Download / Print' button at the top of the page.



4. If you have already completed the Online Annual Questionnaire, the questionnaire can only be accessed by selecting your plan and clicking the 'Online Annual Questionnaire' link / button on the left side of the page.

After clicking the link, you can download a copy of the online annual questionnaire with your answers included by clicking the 'Download / Print' button at the bottom of the page.

A. Company Information

1. **Name:** XYZ Company
2. **Mailing Address:** 123 XYZ Street
CompanyVille, MD 12345
3. **Business Type (C Corp, LLP, etc.):** C Corp
4. **If the business is a sole proprietor, partnership, or LLC/LLP, is it taxed as a sole proprietor or partnership?** Yes
5. **EIN:** 12-1234567
6. **Trust Identification Number:** _____
7. **Fiscal Year End:** _____
8. **Business Code (from corporate tax return / Form 5500):** _____
9. **Filing an extension on corporate tax return?** No
10. **Names / compensation of owners and percentage owned:** _____
11. **Names / compensation of employees who are family members of owners:** _____
12. **Names / compensation / titles of officers:** _____
13. **Ownership of other businesses - affiliated** _____

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