

Form 5500 Preparation and Filing

Ameriflex's Form 5500 solution gives you an end-to-end concierge experience for Form 5500 preparation and direct filing with the DOL.

Benefits

- ✓ Quickly generate and e-File Form 5500s
- ✓ Employee benefits attorney reviewed process
- ✓ Regularly updated with the most current DOL regulations
- ✓ EFAST2-Credentialed direct-to-DOL e-Filing solution
- ✓ Supports WRAP'ed Plans
- ✓ Summary Annual Report (SAR) automatically generated

Dates to be aware of (calendar year plan)

- 7/31 – Form 5500 filing deadline
- 7/31 - Form 5558 extension due, if applicable
- 10/15 – Form 5500 filing deadline if extension has been filed by 7/31

KNOW YOUR RISKS:

THE PENALTIES FOR NON-COMPLIANCE

- Up to \$2,739 per day against plan administrators if deficient, late, or unfiled
- Serious and willful attempts to avoid Form 5500 filing can even result in criminal penalties
- Rejected form 5500s are treated as not filed, and subject to penalty assessment by the DOL