

MEMO# 10079

June 30, 1998

DOL RELEASES NEW FORM 5500 SERIES

[10079] June 30, 1998 TO: PENSION COMMITTEE No. 40-98 PENSION OPERATIONS
ADVISORY COMMITTEE No. 25-98 RE: DOL RELEASES NEW FORM 5500 SERIES

The Department of Labor, in conjunction with the Internal Revenue Service and Pension Benefit Guaranty Corporation, has made available on its website the "proofs" of the new Form 5500, schedules and instructions. The Department of Labor's website address is the following: <http://www.dol.gov/dol/pwba>. Presently, these "proofs" are in the final stages of review and have been submitted to the Office of Management and Budget for approval. The new forms, which are to be used for 1999 plan year annual returns and reports, will be issued in final form after OMB approval is received. Computer scannable versions of the forms and electronic filing options are expected to be developed and published later this year. The entire Form 5500 series is available at the website noted above. The series is voluminous and, therefore, copies are not attached. Please contact Alice Bennett at (202) 218-3560 if you would like the Institute to mail copies to you. Alternatively, if you would like to receive copies via e-mail, please contact Mrs. Bennett at abennett@ici.org. Russell G. Galer
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