

MEMO# 1947

June 1, 1990

COMPUTER GENERATED FORMS 5300, 5307, AND 8717

June 1, 1990 TO: PENSION MEMBERS NO. 26-90 RE: COMPUTER GENERATED FORMS 5300, 5307, AND 8717 _____ Attached is IRS Notice 90-38 regarding computer generated Form 5300, Application for Determination of Employee Benefit Plan, Form 5307, Application for Determination for Adopters of Master or Prototype or Volume Submitter Plans and Form 8717, User Fee for Determination Letter Request. As you recall, the IRS previously announced the availability of free software for computer generation of Form 5307 and 8717. (See Institute Memorandum to Pension Members No. 23-90 dated May 14, 1990.) The attached notice contains general instructions for using computer generated forms when filing for pension plan opinion letters and expands the computer generated forms program to include the optical character reader ("OCR") portion of Form 5300. Software developers are required to submit test documents to the IRS for approval, whereupon the IRS will issue an acceptance number that will become an identifying number appearing at the top of the OCR data sheet and at the top of computer generated Form 8717. Questions regarding the attached notice should be directed to Walter Marciniak of the IRS Employee Plans/Exempt Organizations Determination Branch at (202) 566-6876. We will keep you informed of further developments. W. Richard Mason Assistant General Counsel Attachment

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