

COMPLIANCE QUESTIONS TO SKIP ON 2016 FORM 5500-SERIES RETURNS

Hodgson Russ Newsletter
November 30, 2016

Practices & Industries

Employee Benefits

The IRS has decided that filers of Forms 5500 (including Schedules H, I and R), 5500-SF, and 5500-EZ, should not answer various compliance questions for the 2016 plan year filings:

Form/Schedule

2016 Plan Year

5500

- Preparer Information (page 1 bottom)

Schedule H

- Lines:

- 4o
- 6a-d

Schedule I

- Lines:

- 4o
- 6a-d

Schedule R

- Lines:

- 20a-b
- 21a-b
- 22a-b

Form 5500-SF

COMPLIANCE QUESTIONS TO SKIP ON 2016 FORM 5500-SERIES RETURNS

- Preparer Information (page 1 bottom)

- Lines:

- 14a-d
- 15a-b
- 16a-b
- 17a-b
- 18
- 19

5500-EZ

- Preparer Information (page 2 bottom)

- Lines:

- 4a-d
- 13a-b
- 14
- 15

For those who may still be filing for 2015, the IRS has also published a list of compliance questions to skip on those 5500-series returns.