



OUR VISION

We will become famous for our amazing service and our unique, comprehensive approach to meeting our clients' needs efficiently and effectively.

Electronic Filing of Form 5500 is Coming!

Beginning with the 2009 Plan Year, all Forms 5500 must be filed electronically with the U.S. Department of Labor's Employee Benefit Security Administration (EBSA). Paper filings no longer will be accepted. In addition, shortly after a Form 5500 is electronically filed with the EBSA, it will be posted on the EBSA's Internet site.

We will continue to prepare your Form 5500 for you. However, beginning with the 2009 Plan Year, the Form 5500 will be provided to you electronically and you will be required to affix your signature to the Form electronically. "Pen and ink" signatures will not be accepted.

To electronically sign a Form 5500, the signer first must have obtained what are known as signing credentials. The signing credentials are personal to the signer, so if more than one person in your company signs the Form 5500, they each will need to obtain signing credentials. To obtain signing credentials, each individual will need to go to the EBSA's EFAST website, and complete and submit Form EFAST-1. Upon submitting the Form, the individual will receive a personal identification number ("PIN"). This PIN will be applied to the Form 5500 prior to its submission to the EBSA, replacing the "pen and ink" signature.

We will provide you with additional information on obtaining signing credentials and signing and submitting your Form 5500 electronically as the filing due date draws nearer. We are committed to giving you whatever assistance you need to ensure that your Form 5500 is properly signed and filed.

It is clear that the new process for filing your return will require more lead time to ensure a timely filing. Thus, it will be more important than ever before that we receive the data necessary to prepare your Form 5500 as soon as possible after the Plan Year ends.

Note that Form 5500-EZ, for owner-only plans, will continue to be filed on paper. However, the filing now will go to the IRS.

OUR CORNERSTONES

- Amazing Client Service
- Unique Approach
- Comprehensive Approach
- Efficiently and Effectively Meeting Client Needs