

5500 Tips & Tricks from ftwilliam.com

1. **Generate a '5500 Review Summary' report**, which will provide you with the following information: Plan Sponsor Information, Plan Administrator Information, Plan Information, Portal User Information. The report will have a 'Report Generated on' time stamp at the bottom of the report to help determine when the report was generated. The '5500 Review Summary' report can be generated for all plan years and can be accessed from the 5500 Module, just below the '5500 – 20XX' box'.
2. **The ftwilliam.com software assists you** on the forms/schedules **by graying out fields that are not needed** to be filled in based on prior answers.
3. **You can batch add prior year data and signers globally (for all plans)** through any plan by clicking on Batch/WorkFlow in the 5500 menu box and selecting Bring forward 20XX data to 20XX for all plans or Bring forward 20XX signers to 20XX for all plans (Note: this option is available to the Master User or Designated Admins on your account).
4. **With the patented 55Autofill technology, you may download your prior year filings by simply entering the plan sponsor's tax payer identification number.** All of the 5500s and plan information for that plan sponsor are automatically imported for your use - even if you did not use ftwilliam.com in a prior year.
5. **A few items to note on the 2017 Forms:**
 - Preparer Information has been removed from the Form 5500 and Form 5500-SF
 - Trust Information has been removed from the Form 5500-SF (Part VIII), Schedule H (Lines 6a-6d) and Schedule I (Lines 6a-6d)
 - Compliance questions have been removed from Form 5500-SF (Part IX), Schedule H (Line 4o), Schedule I (Line 4o) and Schedule R (Part VII)
 - Any 2009, 2010, 2011, 2012 and 2013 5500 filings that are submitted after 1/1/2018 will now be displayed on the 2017 forms, similar to how the 2008 and prior year forms work. This also means that if a Schedule MB, R or SB were completed for 2009, 2010, 2011, 2012 and 2013, they will be attached to the filing as a .pdf

If you ever have questions, check out the Help Center where you can find our extensive user guides, video tutorials, and more!

Can't find what you're looking for?

Reach out to us at support@ftwilliam.com or 1-800-596-0714.

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