

“It’s better to look ahead and prepare than to look back and regret.”

– Jackie Joyner Kersee

Employer Webinar Series

Form 5500 Annual Reports for 2009 Are You Ready?

Tuesday, May 11, 2010 - 2 p.m. ET / 11 a.m. PT

The 2009 Form 5500 (the annual return for most employee benefit plans) includes several significant changes from prior years, including:

1. Mandatory electronic filing under the DOL's EFAST 2 filing system
2. Increased disclosure of compensation paid to service providers (on Schedule C)
3. The requirement that Section 403(b) plans complete all lines of the Form 5500 (and attach an independent auditor's report, if the plan has over 100 participants)

These changes will require plans to gather more information than in previous years, and will change the way this information is provided to, and processed by, the relevant governmental entities (the IRS, the DOL and the PBGC).

PRESENTERS:

Robert A. Browning, Partner - Spencer Fane Britt & Browne LLP
Robert joined Spencer Fane in January 2008 as a Partner in the Employee Benefits Group. Robert received his juris doctor at the University of Houston Law Center where he was Associate Editor of the Houston Law Review and a member of the Order of the Coif and Order of the Barons.

Melissa R. Hinkle, Senior Benefits Analyst - Spencer Fane Britt & Browne LLP
Melissa, a Senior Benefits Analyst, has been a member of the firm's Employee Benefits Group for 22 years. She is a Certified Employee Benefits Specialist (CEBS), a Retirement Plans Associate (RPA), and a Group Benefits Associate (GBA).

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