

E-Filing 2009 Form 5500
Executive Summary for Single-Employer Plans
(When Lindquist LLP Prepares Return)

Overview

- 2009 Form 5500 for all pension and welfare plans must be filed electronically.
- As a result, your Plan's filing procedures may change:
 - The Plan's authorized signer must obtain filing signer credentials on the DOL website in advance and participate in a "signing ceremony" prior to filing, either at Lindquist LLP's office or at a remote location that has access to e-mail and the Internet.
- Subsequent to filing, Lindquist LLP will provide a client copy printout of Form 5500 with a copy of the acknowledgement receipt for the Plan's records.

Action Needed from Plan Management

- Plan management must identify the authorized signer (the Plan's Trustee).
- Lindquist LLP recognizes advanced preparation on the part of our Firm and the Plan's other professionals may be necessary. We recommend working with Plan management and other professionals to coordinate a timeline to facilitate timely filing under the new procedures, which may include delivering information sooner than it has been required in the past.

Action Needed from Authorized Signer

Obtain Filing Signer Credentials

- The authorized signer must obtain filing signer credentials at <http://www.efast.dol.gov>. It should take no more than 15 minutes to register, retrieve your PIN and User ID, and create your password.
- We recommend obtaining filing signer credentials as soon as possible.
- Detailed instructions are available in the "EFAST2 Guide for Filers & Service Providers," posted under publications at http://www.efast.dol.gov/fip/forms_pubs.html.
- Keep your PIN, User ID and password.

Sign Form 5500 Prior to Filing

- You may sign the Form at one of Lindquist LLP's offices or from a remote location that has Internet and e-mail access. We will work with you to coordinate signing logistics.
- Make sure you have your PIN, User ID and password available when you sign.
- If you elect to sign at our office, a Lindquist LLP representative will be present to walk you through the process.

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Sign Form 5500 Prior to Filing (Cont'd)

- If you elect to sign remotely via a secure, web-based meeting:
 - A Lindquist LLP representative will e-mail you a link to join the web-based meeting for a scheduled day and time.
 - At the scheduled meeting time, you will click the link to join the meeting, and via conference call, a Lindquist LLP representative will provide step-by-step instructions.
 - The Lindquist LLP representative will provide you with temporary remote access to the Form 5500 software for entering your name, PIN, User ID and date into the Electronic Filing Signature Information form.
- You are finished once you have signed the Form. You need not be present for Form submission.

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