

## Client Email Sample Format

Subject: 5500 Filing Deadline Looming - Your Action Needed

Date: July 1, XXXX

Dear [Firstname],

We would like to remind you that the **July 31, IRS Form 5500 Annual Return/Report of Employee Benefit Plans** is looming. Remember to file your company forms on time to satisfy annual reporting requirements under [ERISA](#) and the Internal Revenue Code.

### Important Tips

- Who should file? Pension and welfare benefit plans must to report their financial condition, investments, and operations.
- The 5500 Form must be filed electronically through [EFAST2](#).
- The 5500 Short Form is for plans with fewer than 100 participants.
- Form [5558](#) is for an extension on Forms [5500](#), [5500-SF](#), [5500-EZ](#), [8955-SSA](#), and 5330.

### Next Steps:

We encourage you to prepare for the reporting sooner rather than later by:

- Watch the Forms 5500, 5500-SF, and 5558 [filing tips video](#).
- Read the frequently asked questions document about the [EFAST2 filing process](#).
- Review the tips for [avoiding errors](#) when requesting an extension.

### Action Item

Please call us within the next week to schedule a convenient Form Filing meeting, and share this information with our staff that may benefit from the information.

We look forward to working with you on this important deadline, and continuing to provide the excellent customer care you've come to expect.

Sincerely,

*Partners Name*

Partner

Anna Beta Certa CPAs

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