

2021 COMPLIANCE WEBINAR

# ERISA Reporting and Disclosure for Welfare Benefit Plans

## *Demystifying the Form 5500 Requirements*

Each year, sponsors of health and welfare benefit plans are required to file Form 5500 unless a small plan or other regulatory exemption applies. The filing deadline is the last day of the seventh month after the end of the plan year – which for a plan operated on a calendar year basis is July 31<sup>st</sup> each year.

In this session, we will review the specific reporting requirements that apply to ERISA plans and dispel many of the myths and misconceptions surrounding the ERISA reporting requirements, including:

- Which plan sponsors are subject to Form 5500 filing requirements?
- What is an ERISA health or welfare benefit plan?
- What is a small employer plan that is not subject to the Form 5500 requirement?
- Are there other filing exemptions, and what are they?
- What are the filing deadlines?
- What is a Summary Annual Report (SAR), who should receive one, and how can it be distributed?
- What should we do if we missed our 5500 deadline or we find an error after our 5500 has been filed?



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**Thursday,**  
**June 24<sup>th</sup>, 2021**  
**11:00 AM – 12:00 PM,**  
**Central Time**

Presented by the Brown & Brown and Hays Companies (part of the Brown & Brown team) Research & Compliance Team.

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