

WHY “DO IT YOURSELF” DOESN’T ALWAYS WORK

CPD was recently able to help a Plan Sponsor who had previously filed his own Form 5500EZ’s for his retirement plans. We saved him a lot of money and headaches.

As part of completing the forms, he checked off the “final return” box. By his way of thinking, all the information was “final” or good. Since he had assets in his plan, it was not a “final” return (and it wasn’t good).

Subsequently, the IRS sent him an inquiry about thiEZep27(2358)0.97(a)3.18(2358’)3.18)0.9(o)0.9)0.97(r)