

Plan Sponsors Should NOT Answer New Compliance Questions on 2015 Forms 5500

March 2, 2016

Certain compliance questions were recently added to the Form 5500/5500-SF and related schedules. The IRS previously announced that these new compliance questions were optional for the 2015 plan year, although the IRS strongly encouraged plan sponsors to complete them. On February 17, 2016, the IRS reversed course and announced that plan sponsors should not answer the compliance questions on their 2015 plan year Form 5500/5500-SF or on Schedules H, I, or R, because the forms and schedules were not approved by the federal Office of Management and Budget before they were published. The IRS announcement is available [here](#).