

Updated Model Summary Annual Report

June 13, 2019

The U.S. Department of Labor has released updated model Summary Annual Reports (SARs) for retirement plans and for welfare benefit plans that are subject to ERISA. Generally, a plan that is required to file an annual Form 5500 is also required to distribute a SAR to plan participants and beneficiaries within nine months from the end of the plan year. [View the updated model SAR for welfare plans.](#) [View the updated model SAR for retirement plans.](#)