



Electronic Filing Now Available For Form 8955-SSA

Reporting Terminated Vested Participants to the Social Security Administration

Form 8955-SSA reports information regarding employees who terminated in prior plan years with remaining vested account balances. This information is transmitted to the Social Security Administration and is used to notify participants of their potential plan-related retirement benefits, when they apply for Social Security Benefits.

The IRS permits electronic filing of Form 8955-SSA, through the FIRE (Filing Information Returns Electronically) system. Filing Form 8955-SSA electronically ensures that return information is accurately received by the IRS and transmitted promptly to the Social Security Administration.

Kravitz is pleased to announce that we will now be completing all Form 8955-SSA filings electronically, at **no additional charge**. Beginning in January 2013, our Kravitz Consultants and Concierge Services staff will be working with each client to ensure these forms are filed timely with the IRS, as needed.*

Steps To File Form 8955-SSA Electronically

1. Kravitz will send Form 8955-SSA along with the regular Form 5500 filing.
2. The Plan Administrator will sign this form, along with the Form 5500 and the Form 5500 e-filing authorization.
3. The forms are scanned and returned to Kravitz as usual and we will electronically file the form with the IRS, on your behalf.

If you have any questions, please contact your Kravitz Consultant.

** Please note that for Cash Balance Online™ plans, the Third Party Administrator firm is responsible for filing Form 8955-SSA, rather than Kravitz.*

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