

# Plan Year 2009 Form 5500 EFAST2 Filing Signer Requirements

Beginning with Plan Year 2009, the Department of Labor and Internal Revenue Service require that the Form 5500 be filed electronically; a process referred to as EFAST2. As such, there is a new procedure for signing these documents as the plan administrator and plan sponsor. The signer will need to register with the EFAST2 system to authorize the 5500(s). The following are instructions on how to register.

## **Instructions for Requesting Filing Signer Credentials**

1. Go to the EFAST2 website: [www.efast.dol.gov](http://www.efast.dol.gov)
2. Click on "Register" in the left hand margin under "Main".
3. Read the privacy statement. After reading, check the box acknowledging reading the agreement, then click "Accept Agreement".
4. Enter the profile information requested, and check "Filing Signer", then click "Next".
5. Select the challenge information and click "Next". This will be needed later to complete registration.
6. Click "Submit" on the registration-summary screen, then click "OK" on the registration-confirmation screen. This will send an email to you with a link to complete the registration process.
7. Click on the link in the email to take you to the EFAST website.
8. Answer the challenge question and click "Next".
9. Read the PIN agreement and click "Accept Agreement".
10. Read the signature agreement, check the box acknowledging reading the agreement, then click "Accept Agreement".
11. Filing credentials will be displayed (userid and PIN), along with your profile information. The userid and PIN are randomly generated by the system and only the PIN may be changed. **Make sure you print these out and/or write them down.** After doing so, click "Next".
12. Create a password between 10 and 20 characters long then click "Save". The password must contain at least one alpha character and one numeric character.
13. Account has been successfully created.

For filing purposes, the email address of each signer is required to complete the filing for the EBSA. If we are preparing your 5500, please forward us the email address(es) of the signers. You do not need to send the PIN or password. These are confidential and should not be shared with anyone.

Please feel free to give us a call if you have any questions or concerns.



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