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# Torrillo & Associates

Benefit Plan Audit Specialists

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## Filing Relief for Form 5500 Filings Due Before July 15, 2020



**AICPA**<sup>®</sup>  
EBPAQC Member

Per the AICPA  
Employee Benefit Plan  
Audit Quality Center,

the IRS issued [Notice 2020-23](#) which provides additional filing relief for taxpayers affected by the ongoing [Coronavirus pandemic](#). The IRS filing relief includes Form 5500, *Annual Return/Report of Employee Benefit Plan*, due to be filed (originally or pursuant to a valid extension) on or after April 1, 2020 and before July 15, 2020. With the relief, the due date for filing is July 15, 2020.

The filing relief is automatic. Taxpayers do not have to call the IRS, file extension forms or send letters or other documents to receive this relief. Additional filing extensions beyond July 15 must be requested using the appropriate extension form by July 15. However, the extension may not go beyond the original or regulatory extension date.

The IRS relief for Form 5500 comes through [Rev. Proc. 2018-58](#). Notice 2020-23 states that Specified Time Sensitive Actions are covered and refers taxpayers to Rev. Proc. 2018-58 which explicitly includes Form 5500.

**Rev. Proc. 2018-58 states that the “postponement of the Form 5500 series filing due date ...will also be permitted by the Department of Labor and the Pension Benefit Guaranty Corporation (PBGC) for similarly situated individuals who are plan administrators.”**



This immediate filing relief does not extend to calendar year 2019 Form 5500 filings originally due July 31, 2020. The EBPAQC will continue to advocate for and monitor filing relief from the IRS and DOL and will communicate to members any additional relief notices.



**Phone:**

**Email:**

**Address:**

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## Who We Are

Torrillo & Associates, LLC specializes in employee benefit plan audits including 401k audits, 403b audits, pension plan audits, and other retirement plan audits. We are licensed in 10 states including Pennsylvania, New Jersey, Delaware, New York and Florida. We are also able to practice in additional states that have passed firm mobility.

## Recent Articles

- [Final Regulations Issued on New Roth Catch-Up Rule](#)
- [Executive Order Issued to Expand Access to Alternative Assets for 401\(k\) Investors](#)

- [DOL Promotes New On-Line Self-Correction Program](#)
- [DOL Files Amicus Brief Supporting Use of Forfeitures to Reduce Employer Contributions](#)

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