

## HR-E Alert

# HURRICANE KATRINA FORM 5500 DEADLINE EXTENSION

September 8, 2005

Qualifying plan administrators affected by Hurricane Katrina who otherwise would have been required to file to file a Form 5500 or Form 5500 EZ annual report/return between August 29, 2005 and October 31, 2005, now may have until October 31, 2005 to file those Forms under special relief announced by the U.S. Department of Labor's Employee Benefits Security Administration (EBSA) on August 28, 2005.

According to the EBSA's August 28, 2005 announcement, the announced relief applies to plan administrators, employers and other entities located in the declared disaster areas directly affected by Hurricane Katrina, as identified by the Federal Emergency Management Agency, as well as firms located outside the affected areas who are unable to obtain the necessary information from service providers, banks or insurance companies whose operations were directly affected by the hurricane.

According to the EBSA announcement, plan filers entitled to an extension of relief should check Part I, Box D, on the Form 5500 or Part 1 on Form 5500-EZ and attach a statement to the form in accordance with the instructions to reflect their claimed entitlement to the relief.

If you have questions or need help evaluating or responding to the effects of Hurricane Katrina or other concerns relating to your human resources, employee benefit, insurance or other operations, or to request information about upcoming programs or alerts, please contact: Cynthia Marcotte Stamer, P.C., Member, Glast, Phillips & Murray, P.C., 2200 One Galleria Tower, 13355 Noel Road, LB 48, Dallas, Texas 75240. Telephone (972) 419-7188. E-mail [cstamer@gpm-law.com](mailto:cstamer@gpm-law.com).

For other helpful resources or additional information about Ms. Stamer and/or Glast, Phillips & Murray, P.C., see [CynthiaStamer.com](http://CynthiaStamer.com) or [gpm-law.com](http://gpm-law.com) or contact Ms. Stamer. If you would like to receive future Alerts or announcements about other programs or developments, please be sure that we have your current contact information – including your preferred e-mail – by providing that information to us via telephone, fax or e-mail using the above contact information.

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