

News Release



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U. S. Labor Department Extends Annual Reports Deadline After Hurricane Katrina Hits Florida

WASHINGTON—The U. S. Department of Labor’s Employee Benefits Security Administration (EBSA) today announced an extension of the deadline for filing Form 5500 and Form 5500 EZ annual report/returns due to property damage and destruction from Hurricane Katrina in Florida.

President Bush has declared a major disaster in 11 counties in Florida due to the damage caused by the hurricane. The extension applies to plan administrators, employers and other entities located in the areas directly affected, as identified by the Federal Emergency Management Agency. The extension also applies to 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.

If the President declares additional counties eligible for individual or public assistance under the Robert T. Stafford Disaster Relief and Emergency Assistance Act, this extension will also apply to them.

Under this relief, Form 5500 series filings required to be filed between Aug. 24, 2005, and Jan. 3, 2006, are granted an extension until Jan. 3, 2006. 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.

The agencies – EBSA, Internal Revenue Service and Pension Benefit Guaranty Corporation -- realize that, due to this natural disaster, there may be instances when full compliance may not be possible. The guiding principle must be to ensure that appropriate efforts are made to act reasonably, prudently and in the interest of the workers and their families, who rely on their health, pension and other benefits for their physical and economic well-being.

For more information about disaster relief, contact the Federal Emergency Management Agency at 1-800-621-3362 or (202) 621-FEMA or the Internal Revenue Service at www.irs.gov under “Disaster Area Tax Relief.” Filers who have additional questions may contact EBSA’s EFAST Help Line at 1-866-463-3278.

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