

Form 5500 Preparation Service

The Department of Labor (DOL) and IRS use your Form 5500 to monitor compliance and identify potential issues. For these reasons, timely, accurate reporting is essential. That's where TIAA can help.

Review. Sign. File.

Our Form 5500 Preparation Service, offered in collaboration with Deloitte¹, simplifies reporting, making it easier for you to manage risk and meet your reporting obligations. It includes:

- Preparation of Forms 5500/5500-SF, Form 8955-SSA and applicable schedules
- Automatic completion and filing of Form 5558 extensions
- Preparation of the Summary Annual Report (SAR)
- Help with efilings of Form 5500 and Form 8955-SSA
- Aggregation of data from multiple service providers, if applicable

Teamwork helps increase efficiency and reduce risk

Deloitte has been preparing Form 5500 for more than 35 years. With their experience, proven processes and secure technology-based tools, you can feel confident about meeting your reporting obligations.

Dedicated Deloitte professional:

- Dedicated support and issue resolution
- Assistance with data gathering
- Ongoing communication and education

Comprehensive testing support:

- Assistance with regulatory requirements
- Reconciliation of Form 5500 with audited financial statements
- IRS/DOL audit risk assessment

Advanced technology:

- Deloitte's web-based Global Advantage Organizer data gathering tool
- Automated alerts and reminders
- Real-time processing status updates

TIAA, Deloitte and you, a powerful combination

98.3%

**Highly rated
service**

**overall client
satisfaction ²**

TIAA	Deloitte	Plan Sponsor
<ul style="list-style-type: none">• Initiates service• Transmits 5500 Plan Financial Reports on file with TIAA to Deloitte	<ul style="list-style-type: none">• Assigns a dedicated Deloitte professional who monitors your plan's progress, and provides resources and tools to support you• Prepares and reviews Forms 5500 and 8955-SSA• Provides you with final electronic copies of the forms for submission	<ul style="list-style-type: none">• Accesses the GlobalAdvantage Organizer data gathering tool• Updates TIAA's data census file• Provides plan information as needed to Deloitte• Reviews, signs and efiles Forms 5500 and 8955-SSA by required deadline

The stakes are high. We can help.

For more information on how our Form 5500 Preparation Service can help make compliance easier, contact your TIAA relationship manager or call the Administrator Telephone Center at 888-842-7782, weekdays, 8 a.m. to 8 p.m. (ET).

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2. Deloitte: "Shaping our Future. The 2022 Report on Services for 5500 and Nondiscrimination Testing (2021 Plan Year)." TIAA-CREF Individual & Institutional Services, LLC, member FINRA, distributes securities products.

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