



7558 King's Pointe Road  
Toledo, OH 43617  
419-842-0600  
Fax 419-841-4736

### IMPORTANT INFORMATION REGARDING FORM 5500 – PART 2 FILING SIGNER CREDENTIALS

New mandatory electronic filing requirements (EFAST2) now apply to the annual Form 5500 that must be filed on behalf of your retirement plan. The new filing procedures require you to sign Form 5500 electronically. In order to do so, you must obtain "filing signer" credentials. The Department of Labor (DOL) will not permit us to obtain the credentials on your behalf. To obtain "filing signer" credentials, you must register on the DOL's website.

1. Open your web browser, go to "efast.dol.gov" and follow the steps below (these steps are also outlined on the website).
2. Click on "Register" on the left side of the page.
3. Read the privacy statement, check the box indicating that you have read the privacy statement, then check the "acceptance" tab. The website will take you to the next page "Register Profile Information."
4. Enter your name, address, phone number, email address and company name. **Note: The email address is probably the most important piece of information because the system will use that address to send you a confirmation email. The email address should be one you can access easily and which you monitor regularly.**
5. On the same page, select the "filing signer" credential, then click the "next" tab.
6. On the next page "Register-Challenge Information" select a challenge question (e.g. place or date of birth), provide an answer, and click the "next" tab.
7. On the "Registration Confirmation" page, click "ok."
8. The DOL will then send an email to the email address you provided. **Note: The DOL indicates that this email will occur immediately. If you do not see the email within a reasonable period of time, you may want to check your "junk email" folder because it is possible that your system may identify the email as spam.**
9. In the email, the DOL will provide a link that you will click on to receive your filing signer credentials (which will consist of a User ID and Pin code). The email message includes a statement indicating that as part of the application, you agree not to share the credentials with anyone, including a commercial service provider.
10. When you click on the link, you will go to the "Register-Challenge Verification Page." You will answer the challenge question (for which you previously provided the answer) and click "next."
11. On the next page "Register-Pin Agreement" you will agree not to share the Pin code, check the box indicating that you have read the agreement, and click "accept agreement."
12. On the next page "Register-Signature Agreement" you will indicate (by clicking "I have read this agreement" and the "accept agreement" tab) that you understand that your electronic signature has the same legal force as a handwritten signature.
13. On the next page "Register-Finalize" the DOL provides you with your user ID and Pin code. **We strongly recommend that you print this page.** Then click "next."
14. On the next page "Register-Password" you will select a 10-16 character password. The password will allow you to access your User ID and Pin code. After entering your password, click "save."
15. The last page "Register-Confirmation" informs you that you have completed the registration process.

If you have questions or difficulty in obtaining your credentials, please contact your plan consultant.