

EP PHONE FORUM
FORM 5330 COMPLETION AND PROCESSING TIDBITS
MARCH 24, 2011

INTRODUCTION and WELCOME TO PHONE FORUM

OVERVIEW OF PROGRAM

COMPLETION of ENTITY INFORMATION SECTION OF FORM 5330

COMPLETION of FORM 5330 FOR THE FOLLOWING ISSUES:

PROHIBITED TRANSACTIONS

MINIMUM FUNDING

EXCESS CONTRIBUTIONS

IF YOU ARE CONTACTED BY THE CAMPUS FOR ADDITION
INFORMATION

QUESTION and ANSWERS