Adding Summary Annual Report or Annual Funding Notice

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To add a Summary Annual Report (SAR) or Annual Funding Notice (AFN), click on the link to the corresponding notice within the "Add Schedules" box. If you add the SAR, you will not have the option to add the AFN until you delete the SAR from the "DRAFT-EDIT" column. The reason you are unable to add both the SAR and AFN at the same time is because the AFN is similar to the SAR, but is only used for Defined Benefit Plans that are subject to the PBGC - all other plans should use the SAR.

NOTE: The SAR/AFN checklists are populated with plan information at the time you click on the link under the 'Add Schedules' box. You should only add the SAR/AFN once all your schedules for the current year are completed.

Most information for the SAR can be obtained directly from the forms and schedules you already have completed. We still recommend opening the SAR Checklist to review and ensure the checklist is completed accurately. Some information cannot be obtained from the schedules and you will have to complete this information on the checklist itself.

Note that there are options in the Admin Menu (located at the top of most screens in ftwilliam.com):

- Set "SAR/AFN Defaults" (SAR/AFN instructions as cover page, Custom SAR/AFN instructions, Copy cost per page (SAR), Copy cost total (SAR), Corrective Distributions (SAR), and Rollover Contributions (SAR)) and
- Set default font type, font size, line spacing, and margins under "Edit Document/SAR/AFN Print Settings."

Defaults will apply to 2010 and later SAR/AFN checklists. Each of the above items can also be modified for a particular SAR/AFN.