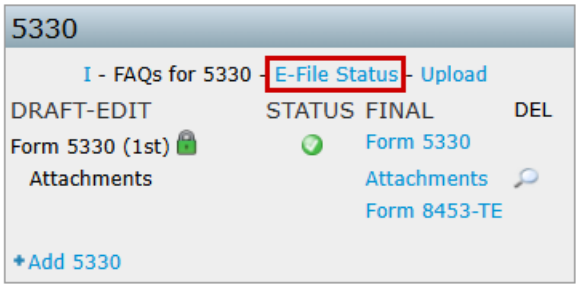
Amending a Form 5330 Filing

09/25/2026 10:52 am CDT

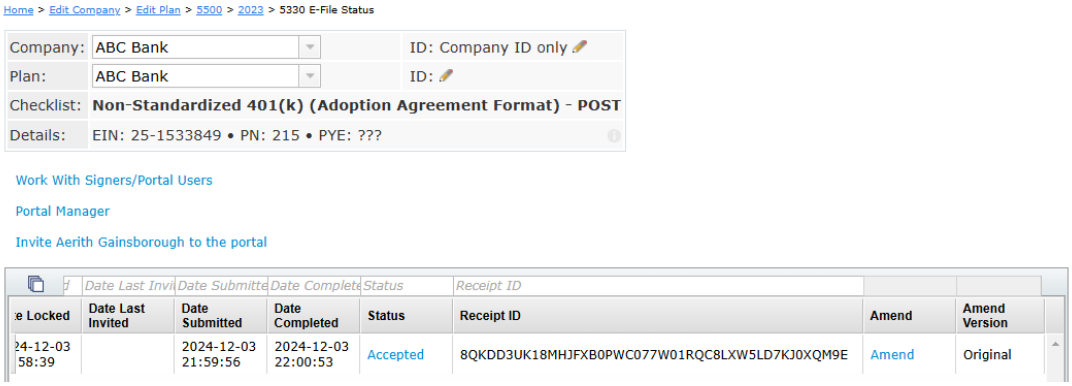
Please Note: **Rejected Submissions** do not require a filing be Amended. Please see the below for more information.

- **Rejected**: the IRS rejected the submission, corrections must be made, and the filing resubmitted. Clicking the Rejected link will provide the IRS response.
  - Rejected filings will automatically be unlocked for edits.
  - Rejected filings have a 10-day Perfection Period. For more details, see FAQ Q9: What happens if a filing is rejected?

To amend a filing that was originally e-filed via ftwilliam.com, navigate to the **E-File Status** page of the **5330** section.



Once on the E-file Status page, scroll to the far right of the grid and select **Amend** next to the filing that needs to be corrected.



Selecting this button will:

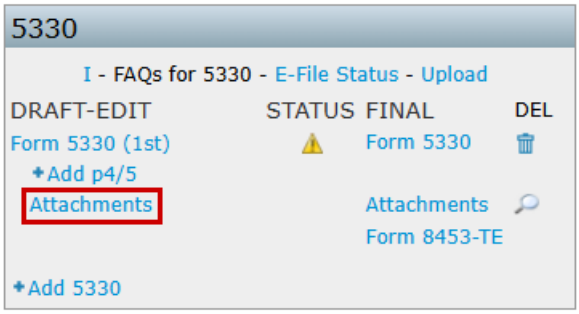
- Redirect to the 5500 module.
- Unlock the Form 5330.
- Check the **Amended** box on Form 5330 Line H.
- Create a new line item on the 5330 E-File Status Dashboard for the amended form.
- **Amending the form does not retain the original attachments. Any necessary documents submitted with the original filing will need to be reattached.**

When making corrections to a Form 5330, the IRS requires an attachment be generated explaining the alterations

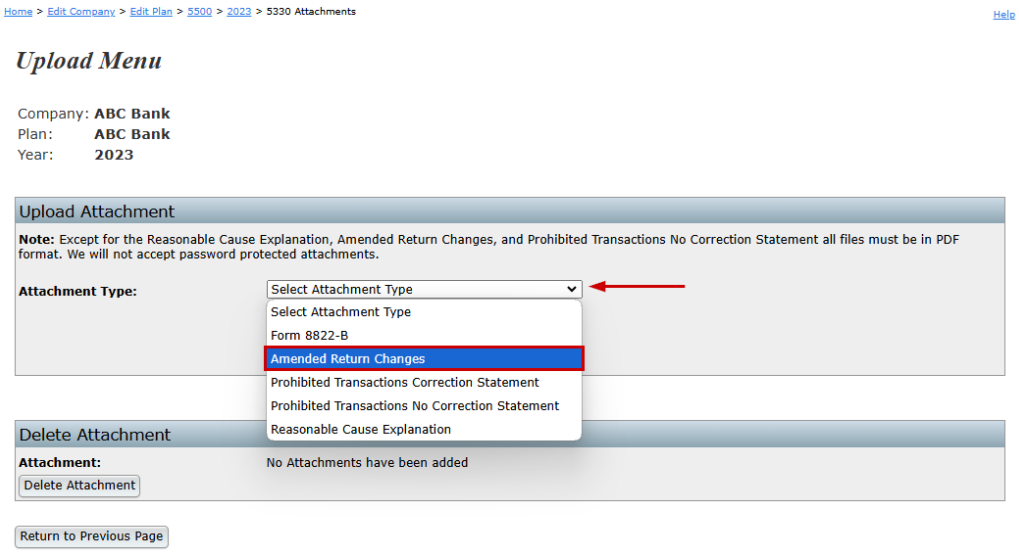
made to the filing. This must be uploaded as a .csv file using the template provided on the **Attachments** screen.

It is suggested that this template be downloaded and completed while making alterations to the Form 5330, as it requires the original inputs to be identified.

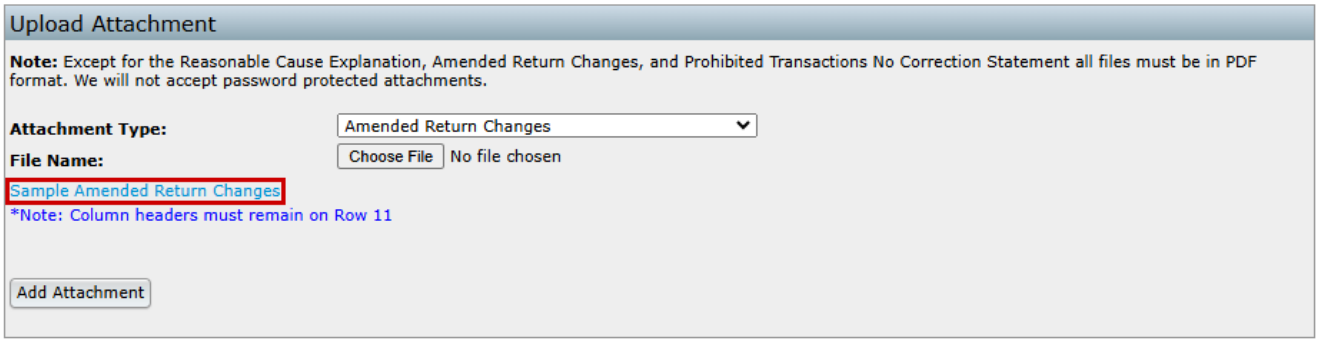
To access the template, select the **Attachment** link below the filing that is being corrected:



Select the **Amended Return Changes** attachment type from the dropdown menu:



Once selected, a link to the .csv template will populate:



To comply with IRS requirements, every column in the provided spreadsheet must be completed without modifying or removing any of the header row or the content in rows 1–11. **Do not remove or alter rows 1-11 or the file will not import properly.**

Here's a detailed breakdown of each column's purpose and instructions:

Column A: PartNum

- Specify whether the alteration affects **Part I** or **Part II** of Form 5330.
- For changes impacting both Part I and Part II, create separate line items for each correction or alteration.
- Use the following codes:
  - Enter **"I"** if the change pertains to **Part I (Lines 1–16)**.
  - Enter **"II"** if the change pertains to **Part II (Lines 17–19)**.

> **Note:** You do not need to document changes made to specific schedules listed on pages 3–6 of Form 5330.

Column B: LineNum

- Indicate the specific line number from Form 5330 that is being corrected or altered.

Column C: OnPreviousReturnAmt

- Enter the original value found in the field identified in Line Number from Column B before the alteration was made.

Column D: OnAmendedReturnAmt

- Enter the updated value that will be reported on the amended return.

Column E: ExplanationTxt

- Provide a clear explanation of the reason for the change.

	A	B	C	D	E
1	Form 5330 - Amended Return Changes				
2	1. DO NOT REMOVE OR MODIFY ROWS 1-11 OR COLUMN A				
3	2. The following are valid values:				
4	Description	Column Headers	Data Type		
5	Part number (I;II)	PartNum	TextType		
6	Line number	LineNum	TextType		
7	Amount on previous return	OnPreviousReturnAmt	USDecimalAmountType		
8	Amount on amended return	OnAmendedReturnAmt	USDecimalAmountType		
9	Explanation of modification	ExplanationTxt	Explanation Type		
10					
11	PartNum	LineNum	OnPreviousReturnAmt	OnAmendedReturnAmt	ExplanationTxt
12	I	13	653	635	Recordkeeping error
13	II	17	653	635	Recordkeeping Error
14	II	19	653	635	Recordkeeping Error

If the amended filing does not include an attachment an error will populate that prevents users from filing:

FW-5330-277:
-->Error: Line H - If Line H is checked, then the Amended Return Changes must be attached.