

**Form 5500-EZ**

**Annual Return of A One-Participant (Owners/Partners and Their Spouses) Retirement Plan or A Foreign Plan**

OMB No. 1545-1610

**2026**

This form is required to be filed under section 6058(a) of the Internal Revenue Code. Certain foreign retirement plans are also required to file this form (see instructions).

Department of the Treasury

► **Complete all entries in accordance with the instructions to the Form 5500-EZ.**

**This Form is Open to Public Inspection.**

**Part I Annual Return Identification Information** *See Form 5500-EZ for instructions and the latest information.*

For the calendar plan year 2026 or fiscal plan year beginning (MM/DD/YYYY) \_\_\_\_\_ and ending \_\_\_\_\_

- A** This return is: (1)  the first return filed for the plan; (2)  an amended return; (3)  the final return filed for the plan; (4)  a short plan year return (less than 12 months)
- B** Check box if filing under  Form 5558  automatic extension  special extension (enter description) \_\_\_\_\_
- C** If this return is for a foreign plan, check this box (see instructions)
- D** If this return is for the IRS Late Filer Penalty Relief Program, check this box (Must be filed on a paper Form with the IRS. See instructions)
- E** If this is a retroactively adopted plan permitted by SECURE Act section 201, check here

**Part II Basic Plan Information — enter all requested information.**

<p><b>1a</b> Name of plan</p>	<p><b>1b</b> Three-digit plan number (PN)</p>	
	<p><b>1c</b> Date plan first became effective (MM/DD/YYYY)</p>	
<p><b>2a</b> Employer's name</p> <p>Trade name of business (if different from name of employer)</p> <p>In care of name</p> <p>Mailing address (room, apt., suite no. and street, or P.O. box)</p> <p>City or town, state or province, country, and ZIP or foreign postal code (if foreign, see instructions)</p>	<p><b>2b</b> Employer Identification Number (EIN) (Do not enter your Social Security Number)</p>	
	<p><b>2c</b> Employer's telephone number</p>	
	<p><b>2d</b> Business code (see instructions)</p>	
<p><b>3a</b> Plan administrator's name (If same as employer, enter "Same")</p> <p>In care of name</p> <p>Mailing address (room, apt., suite no. and street, or P.O. box)</p> <p>City or town, state or province, country, and ZIP or foreign postal code (if foreign, see instructions)</p>	<p><b>3b</b> Administrator's EIN</p>	
	<p><b>3c</b> Administrator's telephone number</p>	
<p><b>4</b> If the employer's name, the employer's EIN, and/or the plan name has changed since the last return filed for this plan, enter the employer's name and EIN, the plan name, and the plan number for the last return in the appropriate space provided.</p> <p><b>a</b> Employer's name</p>	<p><b>4b</b> EIN</p>	
<p><b>4c</b> Plan name</p>	<p><b>4d</b> PN</p>	
<p><b>5a(1)</b> Total number of participants at the beginning of the plan year</p> <p>Total number of active participants at the beginning of the plan year</p> <p>Total number of participants at the end of the plan year</p> <p>number of active participants at the end of the plan year</p> <p>participants who terminated employment during the plan year with accrued that were less than 100% vested</p>	<p><b>a(2)</b></p> <p><b>b(1)</b></p> <p><b>b(2)</b> Total</p> <p><b>c</b> Number of benefits</p>	<p><b>5a(1)</b></p> <p><b>5a(2)</b></p> <p><b>5b(1)</b></p> <p><b>5b(2)</b></p> <p><b>5c</b></p>

**Part III Financial Information**

		(1) Beginning of year	(2) End of year
<b>6a</b> Total plan assets	<b>6a</b>		
<b>b</b> Total plan liabilities	<b>6b</b>		
<b>c</b> Net plan assets (subtract line 6b from 6a)	<b>6c</b>		

