

June 2019

BENEFITS ALERT: Apprenticeship/Training Fund Filings

Apprenticeship/training funds that want to be exempt from Department of Labor (DOL) reporting and disclosure requirements (such as, filing Form 5500 and publishing summary plan descriptions) must file a notice with the DOL. Effective August 16, 2019, that notice must be filed electronically.

Contents of the Notice

The notice must contain the following information:

- The name of the plan
- The plan's EIN
- The name, address and contact information of the plan administrator

In addition to filing the notice, the plan must disclose the above information to its members and make the notice available to any member who requests it.

Filing Requirements

Instructions to file electronically can be found at <https://www.dol.gov/agencies/ebsa/employers-and-advisers/plan-administration-and-compliance/reporting-and-filing/e-file/apprenticeship-and-training-plan-filing-instructions>. The filing itself can be done at <https://www.askebsa.dol.gov/efile/Home/atp>.

The DOL's electronic filing system verifies that all required information is included before it accepts the filing. Once submitted, the DOL will send the plan administrator confirmation that the notice has been submitted. Prior to this rule going into effect, apprenticeship/training funds could file the notice with the DOL either electronically or by mail.

If you need any assistance with, or have any questions about, filing the notice, please do not hesitate to contact us.

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