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## Attention:

- Telephone requests for the forms, schedules, and instructions for the 2008 Form 5500-series will not be filled until December 10, 2008.
- Requests for the 2008 Form 5500-series products can be made on the Internet (see below) beginning December 10, 2008. Requests made prior to that date will be filled with the 2007 version of the products.

The product you are about to view is provided for information purposes and should not be reproduced on personal computer printers by individual taxpayers for filing.

The Forms 5500 and 5500-EZ (and related schedules) are printed on special paper with dropout ink so they can be processed by the computerized processing system "EFAST." These forms and schedules may be obtained by calling 1-800-TAX-FORM (1-800-829-3676). Be sure to order using the IRS form number.

**Note:** You can also use the Internet link [Forms and Publications by U.S. Mail](#) to request a *limited* number of these forms and schedules.

Check the Department of Labor's website at [www.efast.dol.gov](http://www.efast.dol.gov) for additional information concerning the processing system, electronic filing, software, and "non-standard" filings.

**Note:** There is no Schedule B (Form 5500) for filing 2008 plan year actuarial information. Instead, file the 2008 Schedule MB (Form 5500), Multiemployer Defined Benefit Plan and Certain Money Purchase Plan Actuarial Information, or the Schedule SB (Form 5500), Single-Employer Defined Benefit Plan Actuarial Information, as applicable. For only plan year 2008 filings, paper Schedules MB and SB are provided in the format presented for completion by pen or typewriter.

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**Part II** Schedule of Leases in Default or Classified as Uncollectible

(a) Party-in-interest

(b) Identity of lessor/lessee

(c) Relationship to plan, employer, employee organization or other party-in-interest

(d) Terms and description (type of property, location and date it was purchased, terms regarding rent, taxes, insurance, repairs, expenses, renewal options, date property was leased)

(e) Original cost

(f) Current value at time of lease

(g) Gross rental receipts during the plan year

(h) Expenses paid during the plan year

(i) Net receipts

(j) Amount in arrears

(a) Party-in-interest

(b) Identity of lessor/lessee

(c) Relationship to plan, employer, employee organization or other party-in-interest

(d) Terms and description (type of property, location and date it was purchased, terms regarding rent, taxes, insurance, repairs, expenses, renewal options, date property was leased)

(e) Original cost

(f) Current value at time of lease

(g) Gross rental receipts during the plan year

(h) Expenses paid during the plan year

(i) Net receipts

(j) Amount in arrears



**Part III Nonexempt Transactions**

If a nonexempt prohibited transaction occurred with respect to a disqualified person, file Form 5330 with the IRS to pay the excise tax on the transaction.

(a) Identity of party involved

Grid for identity of party involved

(b) Relationship to plan, employer, or other party-in-interest

Grid for relationship to plan, employer, or other party-in-interest

(c) Description of transactions including maturity date, rate of interest, collateral, par or maturity value

Grid for description of transactions including maturity date, rate of interest, collateral, par or maturity value

(d) Purchase price

Grid for purchase price

(h) Cost of asset

Grid for cost of asset

(e) Selling price

Grid for selling price

(i) Current value of asset

Grid for current value of asset

(f) Lease rental

Grid for lease rental

(j) Net gain or (loss) on each transaction

Grid for net gain or (loss) on each transaction

(g) Expenses incurred in connection with transaction

Grid for expenses incurred in connection with transaction

(a) Identity of party involved

Grid for identity of party involved

(b) Relationship to plan, employer, or other party-in-interest

Grid for relationship to plan, employer, or other party-in-interest

(c) Description of transactions including maturity date, rate of interest, collateral, par or maturity value

Grid for description of transactions including maturity date, rate of interest, collateral, par or maturity value

(d) Purchase price

Grid for purchase price

(h) Cost of asset

Grid for cost of asset

(e) Selling price

Grid for selling price

(i) Current value of asset

Grid for current value of asset

(f) Lease rental

Grid for lease rental

(j) Net gain or (loss) on each transaction

Grid for net gain or (loss) on each transaction

(g) Expenses incurred in connection with transaction

Grid for expenses incurred in connection with transaction

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