

Form 5500-SF

Department of the Treasury
Internal Revenue Service

Department of Labor
Employee Benefits Security Administration
Pension Benefit Guaranty Corporation

Short Form Annual Return/Report of Small Employee Benefit Plan

This form is required to be filed under sections 104 and 4065 of the Employee Retirement Income Security Act of 1974 (ERISA), and sections 6057(b) and 6058(a) of the Internal Revenue Code (the Code).

▶ **Complete all entries in accordance with the instructions to the Form 5500-SF.**

OMB Nos. 1210-0110
1210-0089

2023

This Form is Open to Public Inspection

Part I Annual Report Identification Information

For calendar plan year 2023 or fiscal plan year beginning 01/01/2023 and ending 01/23/2023

- A** This return/report is for: a single-employer plan a multiple-employer plan (not multiemployer) (Pension Plan filers checking this box must attach Schedule MEP. Other plans must attach a list of participating employer information in accordance with the form instructions.)
- B** This return/report is the first return/report the final return/report
 an amended return/report a short plan year return/report (less than 12 months)
- C** Check box if filing under: Form 5558 automatic extension DFVC program
 special extension (enter description)
- D** If the plan is a collectively-bargained plan, check here ▶
- 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

1a Name of plan SOLUTUS LEGAL SEARCH 401(K) P/S PLAN	1b Three-digit plan number (PN) ▶	002
	1c Effective date of plan	01/01/2006
2a Plan sponsor's name (employer, if for a single-employer plan) Mailing address (include room, apt., suite no. and street, or P.O. Box) City or town, state or province, country, and ZIP or foreign postal code (if foreign, see instructions) SOLUTUS LEGAL SEARCH 203 REDWOOD SHORES PARKWAY SUITE 150 REDWOOD SHORES, CA 94065	2b Employer Identification Number (EIN)	77-0530583
	2c Sponsor's telephone number	650-473-3244
	2d Business code (see instructions)	541190
3a Plan administrator's name and address <input checked="" type="checkbox"/> Same as Plan Sponsor.	3b Administrator's EIN	
	3c Administrator's telephone number	
4 If the name and/or EIN of the plan sponsor or the plan name has changed since the last return/report filed for this plan, enter the plan sponsor's name, EIN, the plan name and the plan number from the last return/report. a Sponsor's name c Plan Name	4b EIN	
	4d PN	
5a Total number of participants at the beginning of the plan year	5a	10
b Total number of participants at the end of the plan year.....	5b	0
c(1) Number of participants with account balances as of the beginning of the plan year (only defined contribution plans complete this item)	5c(1)	0
c(2) Number of participants with account balances as of the end of the plan year (only defined contribution plans complete this item)	5c(2)	0
d(1) Total number of active participants at the beginning of the plan year.....	5d(1)	10
d(2) Total number of active participants at the end of the plan year.....	5d(2)	0
e Number of participants who terminated employment during the plan year with accrued benefits that were less than 100% vested.....	5e	0

Caution: A penalty for the late or incomplete filing of this return/report will be assessed unless reasonable cause is established.
Under penalties of perjury and other penalties set forth in the instructions, I declare that I have examined this return/report, including, if applicable, a Schedule SB or Schedule MB completed and signed by an enrolled actuary, as well as the electronic version of this return/report, and to the best of my knowledge and belief, it is true, correct, and complete.

SIGN HERE	Filed with authorized/valid electronic signature.	09/25/2025	NINA CHAN
	Signature of plan administrator	Date	Enter name of individual signing as plan administrator
SIGN HERE	Signature of employer/plan sponsor	Date	Enter name of individual signing as employer or plan sponsor

- 6a** Were all of the plan's assets during the plan year invested in eligible assets? (See instructions.)..... Yes No
- b** Are you claiming a waiver of the annual examination and report of an independent qualified public accountant (IQPA) under 29 CFR 2520.104-46? (See instructions on waiver eligibility and conditions.)..... Yes No
- If you answered "No" to either line 6a or line 6b, the plan cannot use Form 5500-SF and must instead use Form 5500.**
- c** If the plan is a defined benefit plan, is it covered under the PBGC insurance program (see ERISA section 4021)? Yes No Not determined
- If "Yes" is checked, enter the My PAA confirmation number from the PBGC premium filing for this plan year _____ (See instructions.)

Part III Financial Information			
7 Plan Assets and Liabilities		(a) Beginning of Year	(b) End of Year
a Total plan assets	7a	761517	0
b Total plan liabilities	7b	0	
c Net plan assets (subtract line 7b from line 7a)	7c	761517	0
8 Income, Expenses, and Transfers for this Plan Year		(a) Amount	(b) Total
a Contributions received or receivable from:			
(1) Employers	8a(1)		
(2) Participants	8a(2)		
(3) Others (including rollovers)	8a(3)		
b Other income (loss)	8b	41432	
c Total income (add lines 8a(1), 8a(2), 8a(3), and 8b)	8c		41432
d Benefits paid (including direct rollovers and insurance premiums to provide benefits)	8d	0	
e Certain deemed and/or corrective distributions (see instructions) .	8e	0	
f Administrative service providers (salaries, fees, commissions)	8f	551	
g Other expenses	8g		
h Total expenses (add lines 8d, 8e, 8f, and 8g)	8h		551
i Net income (loss) (subtract line 8h from line 8c)	8i		40881
j Transfers to (from) the plan (see instructions)	8j	-802398	

Part IV Plan Characteristics	
9a	If the plan provides pension benefits, enter the applicable pension feature codes from the List of Plan Characteristic Codes in the instructions: 2E 3D 2G 2J 2K 2F 2T
b	If the plan provides welfare benefits, enter the applicable welfare feature codes from the List of Plan Characteristic Codes in the instructions:

Part V Compliance Questions				
10 During the plan year:		Yes	No	Amount
a Was there a failure to transmit to the plan any participant contributions within the time period described in 29 CFR 2510.3-102? Continue to answer "Yes" for any prior year failures until fully corrected. (See instructions and DOL's Voluntary Fiduciary Correction Program)	10a		X	
b Were there any nonexempt transactions with any party-in-interest? (Do not include transactions reported on line 10a.)	10b		X	
c Was the plan covered by a fidelity bond?	10c	X		400000
d Did the plan have a loss, whether or not reimbursed by the plan's fidelity bond, that was caused by fraud or dishonesty?	10d		X	
e Were any fees or commissions paid to any brokers, agents, or other persons by an insurance carrier, insurance service, or other organization that provides some or all of the benefits under the plan? (See instructions.)	10e		X	
f Has the plan failed to provide any benefit when due under the plan?	10f		X	
g Did the plan have any participant loans? (If "Yes," enter amount as of year-end.)	10g		X	
h If this is an individual account plan, was there a blackout period? (See instructions and 29 CFR 2520.101-3.)	10h	X		
i If 10h was answered "Yes," check the box if you either provided the required notice or one of the exceptions to providing the notice applied under 29 CFR 2520.101-3	10i	X		

Part VI Pension Funding Compliance

11 Is this a defined benefit plan subject to minimum funding requirements? (If "Yes," see instructions and complete Schedule SB (Form 5500) and lines 11a and b below.) If this is a defined contribution pension plan, leave line 11 blank and complete line 12 below. Yes No

a Enter the unpaid minimum required contributions for all years from Schedule SB (Form 5500) line 40 **11a**

b **PBGC missed contribution reporting requirements.** If the plan is covered by PBGC and the amount reported on line 11a is greater than \$0, has PBGC been notified as required by ERISA sections 4043(c)(5) and/or 303(k)(4)? Check the applicable box:

- Yes.
- No. Reporting was waived under 29 CFR 4043.25(c)(2) because contributions equal to or exceeding the unpaid minimum required contribution were made by the 30th day after the due date.
- No. The 30-day period referenced in 29 CFR 4043.25(c)(2) has not yet ended, and the sponsor intends to make a contribution equal to or exceeding the unpaid minimum required contribution by the 30th day after the due date.
- No. Other. Provide explanation _____

12 Is this a defined contribution plan subject to the minimum funding requirements of section 412 of the Code or section 302 of ERISA? Yes No
 (If "Yes," complete line 12a or lines 12b, 12c, 12d, and 12e below, as applicable.) If this is a defined benefit pension plan, leave line 12 blank and complete line 11 above.

a If a waiver of the minimum funding standard for a prior year is being amortized in this plan year, see instructions, and enter the date of the letter ruling granting the waiver. Month _____ Day _____ Year _____

If you completed line 12a, complete lines 3, 9, and 10 of Schedule MB (Form 5500), and skip to line 13.

b Enter the minimum required contribution for this plan year **12b**

c Enter the amount contributed by the employer to the plan for this plan year **12c**

d Subtract the amount in line 12c from the amount in line 12b. Enter the result (enter a minus sign to the left of a negative amount) **12d**

e Will the minimum funding amount reported on line 12d be met by the funding deadline? Yes No N/A

Part VII Plan Terminations and Transfers of Assets

13a Has a resolution to terminate the plan been adopted in any plan year? Yes No

a If "Yes," enter the amount of any plan assets that reverted to the employer this year. **13a** 0

b Were all the plan assets distributed to participants or beneficiaries, transferred to another plan, or brought under the control of the PBGC? Yes No

c If, during this plan year, any assets or liabilities were transferred from this plan to another plan(s), identify the plan(s) to which assets or liabilities were transferred. (See instructions.)

13c(1) Name of plan(s):	13c(2) EIN(s)	13c(3) PN(s)
TRINET	77-0530583	245

Part VIII IRS Compliance Questions

14a Does the plan satisfy the coverage and nondiscrimination tests of Code sections 410(b) and 401(a)(4) by combining this plan with any other plans under the permissive aggregation rules? Yes No

14b If this is a Code section 401(k) plan, check all boxes that apply to indicate how the plan is intended to satisfy the nondiscrimination requirements for employee deferrals and employer matching contributions (as applicable) under Code sections 401(k)(3) and 401(m)(2).

- Design-based safe harbor method
- "Prior year" ADP test
- "Current year" ADP test
- N/A

15 If the plan sponsor is an adopter of a pre-approved plan that received a favorable IRS Opinion Letter, enter the date of the Opinion Letter 06/30/2020 (MM/DD/YYYY) and the Opinion Letter serial number Q703971A.



September 5, 2025

Department of Labor

Re: Reasonable Cause Statement for Late Filing of Final 2023 Form 5500

Plan Name: Solutus Legal Search LLC 401(k) Profit Sharing Plan

EIN: 77-0530583

Plan Number: 002

Dear EBSA Representative

We respectfully submit this reasonable cause statement in connection with the late filing of the Final 2023 Form 5500 for the Solutus Legal Search LLC 401(k) Profit Sharing Plan (terminated effective January 23, 2023). Solutus Legal Search LLC (“Solutus”) acted diligently and in full good faith both prior to and after the filing deadline. The late filing was caused solely by confusing and inconsistent instructions from our recordkeepers during a corporate transition. At no time did Solutus neglect or disregard its filing obligations.

Background and Timeline

- **Prior to September 15, 2023** – PAi served as the plan’s recordkeeper under contract with ShareBuilder, the plan’s fiduciary. On September 15, 2023, PAi merged with Ascensus, who became the new recordkeeper for all PAi/ShareBuilder plans, including Solutus’s. This transition created communication gaps and processing delays that directly impacted our plan’s filing.
- **September 6, 2023 (Exhibit A)** – PAi confirmed receipt of Solutus’s timely 2022 Form 5500 filing and notified Solutus that a 2023 Final Form 5500 was required due to the plan termination. The email stated that a follow-up message would be sent once the 2023 questionnaire was posted to the employer site. No such follow-up was ever received. The same September 6 email also instructed Solutus to “disregard the dates” shown in the system (which incorrectly displayed a full 2021 plan year) and instead provide data for the short year 1/1/2023–1/23/2023. These contradictory instructions created significant uncertainty.
- **December 18, 2023 (Exhibits B and C)** – Solutus received two conflicting EFAST2 emails within minutes: one rescinding the signature request and another re-issuing it. This undermined clarity about the filing status.
- **December 31, 2023 (Exhibit D)** – Solutus’s CEO, Julie Brush, completed the required forms and provided her electronic signature before the deadline. However, the “Submit” button did not function. Ms. Brush immediately emailed Ascensus on 12/31/2023 to report the issue.
- **January 10, 2024 (Exhibit E)** – Ascensus confirmed receipt of Solutus’s completed questionnaire and advised that a draft Form 5500 would be prepared. Despite this assurance, no draft was ever delivered for Solutus to review or file.

Issues Beyond Solutus’s Control

- The recordkeeper transition from PAi to Ascensus disrupted continuity and communications.



- Ascensus/PAi promised, but failed, to send the follow-up questionnaire email referenced on September 6.
- Contradictory instructions required Solutus to disregard incorrect dates and substitute alternative plan year dates.
- Back-to-back rescinded and reissued EFAST2 signature requests caused further confusion.
- Despite Solutus's CEO timely completing and signing the filing, Ascensus never released the draft Form 5500 for final submission.

Good Faith, Diligence, and Fiduciary Reliance

Solutus consistently acted in good faith, supplied all requested information promptly, and executed its filing obligations before the deadline. Solutus entrusted its filing responsibilities to PAi/Ascensus and ShareBuilder, who served as professional fiduciaries and recordkeepers under ERISA. Solutus reasonably relied on their expertise, timely followed their instructions, and provided all required information. The filing delay resulted directly from these fiduciaries' mismanagement and miscommunication.

Importantly, the plan was terminated effective January 23, 2023, and there was no ongoing plan activity thereafter. The filing delay had no adverse effect on participants or beneficiaries, underscoring that penalties in this case would be purely punitive.

The record clearly establishes that Solutus's CEO executed the filing before the deadline, and that Ascensus later confirmed receipt of the completed materials. Thus, Solutus met its obligations in a timely manner; the late filing was caused entirely by failures of the recordkeeper's systems and processes.

Request for Relief

Given the above facts, Solutus respectfully requests that the Department of Labor **waive all late filing penalties in their entirety**. Solutus acted diligently, provided all information in a timely manner, and reasonably relied on professional recordkeepers who confirmed receipt of the filing materials but failed to finalize and release the Form 5500. The filing delay was solely the result of factors outside of Solutus's control.

We appreciate your consideration of this request. Please contact us if additional information or documentation is required. Supporting exhibits (Exhibits A–E), including contemporaneous emails and confirmations, are attached for your review.

Sincerely,

Julie Brush
Chief Executive Officer
Solutus Legal Search LLC

From: Julie Brush julieq@solutuslegal.com
Subject: FW: Year End Work Needed – Solutus Legal Search 401(k) P/S Plan
Date: August 28, 2025 at 9:24 AM
To: Nina Chan nina@solutuslegal.com

JB

Julie Q. Brush
Founder & CEO
Solutus Legal Search LLC
www.solutuslegal.com

Bio: [Julie Q. Brush](#)
Twitter: [@lawyerwhisperer](#)

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From: Ascensus-Transfers <copilottransfers@copilot.ascensus.com>
Date: Wednesday, September 6, 2023 at 11:00 AM
To: Julie Brush <julieq@solutuslegal.com>
Cc: maxine.sandoval@empower.com <maxine.sandoval@empower.com>, trinet401k@empower.com <trinet401k@empower.com>
Subject: Year End Work Needed – Solutus Legal Search 401(k) P/S Plan

Hello Julie,

Thank you for electronically submitting the 2022 Form 5500 for the Solutus Legal Search 401(k) P/S Plan. Due to the merger, this plan is required to file a 2023 Final Form 5500.

You will receive an email shortly letting you know the 2023 questionnaire has posted to the employer site. The date range on the email will indicate you need to enter information for the entire 2021 plan year.

Please disregard the dates and provide the information from 1/1/2023 through 01/23/2023.

If no hours or income were earned for 2023 by the employees, as employees of the Solutus Legal Search company, then please list one hour for hours and one dollar for income.

Please submit this information as soon as possible and PAi will process and provide a 2023 Final Form 5500 for you to file electronically.

... 2020 ...

If you require assistance with completing the year end, please contact our service group at 1-800-236-7400 Option 2.

Thank you,

Mackenzie Glodowski
Customer Care Specialist II, Client Operations

P 800-236-7400
ascensus.com



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ref:_00Di0Jq98._5006S24OXjE:ref

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This email has been scanned for viruses and malware

From: Julie Brush julieq@solutuslegal.com
Subject: FW: EFAST2 signature no longer needed
Date: August 28, 2025 at 9:25 AM
To: Nina Chan nina@solutuslegal.com



Julie Q. Brush
Founder & CEO
Solutus Legal Search LLC
www.solutuslegal.com

Bio: [Julie Q. Brush](#)
Twitter: [@lawyerwhisperer](#)

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From: noreply@efast.dol.gov <noreply@efast.dol.gov>
Date: Monday, December 18, 2023 at 2:06 PM
To: Julie Brush <julieq@solutuslegal.com>
Subject: EFAST2 signature no longer needed

Your signature is no longer needed on the Solutus Legal Search Form 5500 Series filing because the filing is being further edited, the filing has been deleted, or your signature request has been rescinded by the filing author.

If you have questions or feel this action is an error, please contact Plan Terminations at copilotplantermination@copilot.ascensus.com.

Thank you!

This is a system-generated email. No reply is necessary.

From: Julie Brush julieq@solutuslegal.com
Subject: FW: EFAST2 signature needed
Date: August 28, 2025 at 12:00 PM
To: Nina Chan nina@solutuslegal.com

JB

I believe I already signed this. I'm looking for verification email

Julie Q. Brush
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From: noreply@efast.dol.gov <noreply@efast.dol.gov>
Date: Monday, December 18, 2023 at 2:09 PM
To: Julie Brush <julieq@solutuslegal.com>
Subject: EFAST2 signature needed

You have been asked to sign Form 5500 Series filing "Solutus Legal Search" by Plan Terminations.

To sign this filing, go to the EFAST2 Website at www.efast.dol.gov and Login.

After logging in, you will be on the Filing Summary webpage which lists any filings awaiting your signature. Your PIN is needed as your electronic signature and can be viewed through the link at the top of that webpage.

On the Filing Summary webpage, use the "Provide Signature" button at the bottom of the page to review and then sign this filing. Refer to the EFAST2 and IFILE Quick Start Guide if you need assistance navigating the website or filing process.

If you have questions or feel you should not sign this filing, please contact Plan Terminations directly by sending an email to: copilotplantermination@copilot.ascensus.com.

Thank you.

This is a system-generated email. No reply is necessary.

From: Julie Brush julieq@solutuslegal.com
Subject: [EXTERNAL] Solutus Form 550) Filing
Date: December 31, 2023 at 5:52 PM
To: CoPilotPlanTermination@ascensus.com

JB

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Hello and happy new year!

This email was in my junk folder and I just was alerted to the filing. I filled out all forms and provided my signature. The “Submit” button was not available. So I’d like to confirm that it was received and filed – and everything is correct.

It also noted that the last revision was 01/01/2024, which is incorrect. I submitted the form with my signature on 12/31/2023.

Many thanks for your help –

Best,

Julie Brush

Julie Q. Brush

Founder & CEO

Solutus Legal Search LLC

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Bio: [Julie Q. Brush](#)

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From: Julie Brush julieq@solutuslegal.com
Subject: FW: Submission confirmation: Form 5500 Questionnaire for Solutus Legal Search 401(k) P/S Plan, PYE 12/31/2023
Date: August 28, 2025 at 9:23 AM
To: Nina Chan nina@solutuslegal.com



Julie Q. Brush
Founder & CEO
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From: 5500services@ascensus.com <5500services@ascensus.com>
Date: Wednesday, January 10, 2024 at 1:49 AM
To: Julie Brush <julieq@solutuslegal.com>
Subject: Submission confirmation: Form 5500 Questionnaire for Solutus Legal Search 401(k) P/S Plan, PYE 12/31/2023

Thank you!

We received your Form 5500 Questionnaire. We'll begin working on your draft Form 5500 and will send you an email when it's ready for your review. For reference, here's our review schedule.



After December 31, 2023, we will file an extension on your behalf and make every effort to prepare your Form 5500 for review by May 15, 2024.

Review and retain your questionnaire summary

Please review, print and retain this [summary of your answers](#). If you find that you've answered a question incorrectly or have additional information to add, please contact your client service team at the number below.



If you have any questions or need assistance with this process, please contact your client service team.



July 31, 2024

From: Julie Brush julieq@solutuslegal.com
Subject: FW: [EXTERNAL] Solutus Form 550) Filing
Date: August 28, 2025 at 12:03 PM
To: Nina Chan nina@solutuslegal.com

JB

See below

Julie Q. Brush

Founder & CEO
Solutus Legal Search LLC
www.solutuslegal.com

Bio: [Julie Q. Brush](#)
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From: Julie Brush <julieq@solutuslegal.com>
Date: Tuesday, January 16, 2024 at 7:58 AM
To: CoPilot <copilotplanservice@ascensus.com>
Subject: Re: [EXTERNAL] Solutus Form 550) Filing

Hi – I've filed this information and it says that it is processing and has filed an extension. Do I still need to talk to you?

Julie Q. Brush

Founder & CEO
Solutus Legal Search LLC
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From: CoPilot <copilotplanservice@ascensus.com>
Date: Monday, January 15, 2024 at 10:44 AM
To: Julie Brush <julieq@solutuslegal.com>

----- Original Message -----

Subject: RE: [EXTERNAL] Solutus Form 550) Filing

Dear Julie,

Thank you for reaching out for confirmation.

I do not see the form was signed and accepted by 12/31/2023. Please call our office to determine next steps.

We look forward to assisting you further.

Amanda Maher
Senior Customer Care Consultant
E copilotplanservice@ascensus.com
P 833-892-8878
ascensus.com

----- Original Message -----

From: Julie Brush [julieq@solutuslegal.com]
Sent: 1/1/2024, 11:08 AM
To: copilotplanservice@ascensus.com
Subject: [EXTERNAL] Solutus Form 550) Filing

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It also noted that the last revision was 01/01/2024, which is incorrect. I submitted the form with my signature on 12/31/2023.

Many thanks for your help –

Best,

Julie Brush

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Founder & CEO

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