

# Hunter Benefits Consulting Group

## Critical Dates for Retirement Plan Data Submission For February 28<sup>th</sup> Plan Year End

Critical Date*	Action / Deadline
<b>April 15<sup>th</sup></b>	Census and Questionnaire due in order to review for tests and calculations
<b>September 1<sup>st</sup></b>	Deadline to get any outstanding information to HBCG to avoid extension and late data fee.
<b>September 15<sup>th</sup></b>	Form 5558 Extensions are prepared and mailed to the IRS if your Form 5500 has not yet been completed and signed.
	If Plan data has not been received, there is a fee for filing the extension and a Late Data Fee for tracking and follow-up time spent.
<b>September 30<sup>th</sup></b>	Form 5500 Due (if not on extension)
<b>October 15<sup>th</sup></b>	Peak time processing fee starts. If your Plan information is not received or in good order, a Late Data Rush Fee will be incurred.
<b>November 15<sup>th</sup></b>	Deposit due for <u>all</u> Defined Benefit and Money Purchase Pension Plans funding. There is <b>not</b> an automatic extension if the deadline falls on a weekend. Applicable to <i>all</i> business entity types.
<b>November 15<sup>th</sup></b>	Company contribution deposit due for tax deductibility for company filings on extension.
<b>November 15<sup>th</sup></b>	If complete data has not been submitted or is not in good order, a third and final Late Data Fee will be incurred.
<b>December 15<sup>th</sup></b>	Final Deadline for filing Form 5500 with extension.
	Funding Deadline for Sole Proprietors Profit Sharing or 401(k).

\*If the date listed falls on a weekend (with the exception of the Company Contribution Deposit due date), the Monday immediately following will be the deadline.