

# Hunter Benefits Consulting Group

## Critical Dates for Retirement Plan Data Submission For July 31<sup>st</sup> Plan Year End

Critical Date*	Action / Deadline
September 15 <sup>th</sup>	Census and Questionnaire due in order to review for tests and calculations
February 1 <sup>st</sup>	Deadline to get any outstanding information to HBCG to avoid extension and late data fee.
February 15 <sup>th</sup>	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.
February 28 <sup>th</sup>	Form 5500 Due (if not on extension)
March 15 <sup>th</sup>	Peak time processing fee starts. If your Plan information is not received or in good order, a Late Data Rush Fee will be incurred.
April 15 <sup>th</sup>	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.
April 15 <sup>th</sup>	Company contribution deposit due for tax deductibility for company filings on extension.
April 15 <sup>th</sup>	If complete data has not been submitted or is not in good order, a third and final Late Data Fee will be incurred.
May 15 <sup>th</sup>	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.