

Hunter Benefits Consulting Group

Critical Dates for Retirement Plan Data Submission For December 31st Plan Year End

Critical Date*	Action / Deadline
February 15 th	Census and Questionnaire due in order to review for tests and calculations
July 1 st	Deadline to get any outstanding information to HBCG to avoid extension and late data fee.
July 15 th	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.
July 31 st	Form 5500 Due (if not on extension)
August 15 th	Peak time processing fee starts. If your Plan information is not received or in good order, a Late Data Rush Fee will be incurred.
September 15 th	Deposit due for <u>all</u> Defined Benefit and Money Purchase Pension Plans funding. There is not an automatic extension if the deadline falls on a weekend. Applicable to <i>all</i> business entity types.
September 15 th	Company contribution deposit due for tax deductibility for company filings on extension.
September 15 th	If complete data has not been submitted or is not in good order, a third and final Late Data Fee will be incurred.
October 15 th	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.