

Q 1 2 0 2 4

jan

15

Provide/Confirm prior year census data

31

Deadline: Sending Form 1099-R to participants who received distributions during previous year*

feb

15

Review/Approve compliance testing results

28

Deadline: Filing Form 1099-R on paper with IRS to report distributions made in previous year. Deadline for electronic filing is March 31*

mar

15

Deadline: ADP/ACP test corrective distributions to avoid 10% excise tax Note: A special deadline may apply to plans that satisfy the requirements of an eligible automatic contribution arrangement (EACA). See "June"

Deadline: Filing partnership tax returns and contribution deadline for deductibility (without extension) for companies operating on calendar-year fiscal year

Deadline: Requesting automatic extension to September 15 for partnership tax returns

31

Deadline: Electronic filing of Form 1099-R to report distributions made in previous year

