

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
		1	2	3	4	5						1	2						1	2
6	7	8	9	10	11	12	3	4	5	6	7	8	9	3	4	5	6	7	8	9
13	14	15	16	17	18	19	10	11	12	13	14	15	16	10	11	12	13	14	15	16
20	21	22	23	24	25	26	17	18	19	20	21	22	23	17	18	19	20	21	22	23
27	28	29	30	31			24	25	26	27	28			24	25	26	27	28	29	30
														31						
APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
	1	2	3	4	5	6			1	2	3	4							1	
7	8	9	10	11	12	13	5	6	7	8	9	10	11	2	3	4	5	6	7	8
14	15	16	17	18	19	20	12	13	14	15	16	17	18	9	10	11	12	13	14	15
21	22	23	24	25	26	27	19	20	21	22	23	24	25	16	17	18	19	20	21	22
28	29	30					26	27	28	29	30	31		23	24	25	26	27	28	29
														30						
JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
	1	2	3	4	5	6				1	2	3	1	2	3	4	5	6	7	
7	8	9	10	11	12	13	4	5	6	7	8	9	10	8	9	10	11	12	13	14
14	15	16	17	18	19	20	11	12	13	14	15	16	17	15	16	17	18	19	20	21
21	22	23	24	25	26	27	18	19	20	21	22	23	24	22	23	24	25	26	27	28
28	29	30	31				25	26	27	28	29	30	31	29	30					
OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
	1	2	3	4	5						1	2	1	2	3	4	5	6	7	
6	7	8	9	10	11	12	3	4	5	6	7	8	9	8	9	10	11	12	13	14
13	14	15	16	17	18	19	10	11	12	13	14	15	16	15	16	17	18	19	20	21
20	21	22	23	24	25	26	17	18	19	20	21	22	23	22	23	24	25	26	27	28
27	28	29	30	31			24	25	26	27	28	29	30	29	30	31				

JANUARY

- 31 Provident Trust Group mails all Account Owners the following:
 - 2018 1099-R, 1099-INT, 1099-Q, and 1099-SA Forms (as applicable)
 - 2018 Annual Account Statements
 - Notice for Required Minimum Distributions (“RMD”) for Traditional, SEP, and SIMPLE IRA clients age 70½ or older

MARCH

- 1 Completed Fair Market Value (“FMV”) Forms and supporting documents due to Provident Trust Group for FMV amount updates
- 1 Last day to request corrections made to your Annual Account Statement

APRIL

- 1 IRS Deadline for those who turned 70½ in the prior year to take their 1st RMD from Traditional, SEP, and SIMPLE IRAs
- 1 Provident Trust Group electronically files the 1099-R, 1099-INT, 1099-Q, and 1099-SA Forms (as applicable) with the IRS
- 15 IRS deadline to make contributions to your IRA for the prior year except for Maine and Massachusetts
- 17 For the states of Maine and Massachusetts only, individuals have until April 17th to make contributions to their IRAs for the prior year
- 30 The Form 5498-ESA or a substitute Form 5498-ESA needs to be provided to the designated beneficiary (as applicable)

MAY

- 31 Contribution recharacterization requests due to Provident Trust Group
- 31 Provident Trust Group electronically files the Forms 5498, 5498-ESA, and 5498-SA (as applicable) with the IRS

OCTOBER

- 15 IRS deadline for recharacterizing a regular contribution made to a Traditional IRA or Roth IRA and for removing an excess IRA contribution, either of which occurred in the prior year
- 31 Completed RMD requests due to Provident Trust Group for guaranteed processing for in-kind RMDs

DECEMBER

- 3 Completed RMD requests due to Provident Trust Group for guaranteed processing for cash RMDs
- 31 IRS deadline to establish a Solo 401(k) plan for self-employed persons