

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						1	1	2	3	4	5	6	7	
5	6	7	8	9	10	11	2	3	4	5	6	7	8	8	9	10	11	12	13	14
12	13	14	15	16	17	18	9	10	11	12	13	14	15	15	16	17	18	19	20	21
19	20	21	22	23	24	25	16	17	18	19	20	21	22	22	23	24	25	26	27	28
26	27	28	29	30	<span style="color: green;">31</span>		23	24	25	26	27	28	29	29	30	<span style="color: green;">31</span>				
APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
			<span style="color: green;">1</span>	2	3	4					1	2	<span style="color: green;">1</span>	2	3	4	5	6		
5	6	7	8	9	10	11	3	4	5	6	7	8	9	7	8	9	10	11	12	13
12	13	14	<span style="color: green;">15</span>	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20
19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	27
26	27	28	29	<span style="color: green;">30</span>			24	25	26	27	28	29	30	28	29	30				
							31													
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						1		1	2	3	4	5		
5	6	7	8	9	10	11	2	3	4	5	6	7	8	6	7	8	9	10	11	12
12	13	14	15	16	17	18	9	10	11	12	13	14	15	13	14	15	16	17	18	19
19	20	21	22	23	24	25	16	17	18	19	20	21	22	20	21	22	23	24	25	26
26	27	28	29	30	31		23	24	25	26	27	28	29	27	28	29	30			
							30	31												
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	1	2	3	4	5	6	7		1	2	<span style="color: green;">3</span>	4	5	
4	5	6	7	8	9	10	8	9	10	11	12	13	14	6	7	8	9	10	11	12
11	12	13	14	<span style="color: green;">15</span>	16	17	15	16	17	18	19	20	21	13	14	15	16	17	18	19
18	19	20	21	22	23	24	22	23	24	25	26	27	28	20	21	22	23	24	25	26
25	26	27	28	29	<span style="color: green;">30</span>	31	29	30					27	28	29	30	31			

## JANUARY

- 31 Provident Trust Group mails all Account Owners the following:
  - 2019 1099-R, 1099-INT, 1099-Q, and 1099-SA Forms (as applicable)
  - 2019 Annual Account Statements
  - Notice for Required Minimum Distributions ("RMD") for Traditional, SEP, and SIMPLE IRA clients age 72 or older

## MARCH

- 31 Completed Fair Market Value ("FMV") Forms and supporting documents due to Provident Trust Group for FMV amount updates
- 31 Last day to request corrections made to your Annual Account Statement
- 31 Provident Trust Group electronically files the 1099-R, 1099-INT, 1099-Q, and 1099-SA Forms (as applicable) with the IRS

## APRIL

- 1 IRS Deadline for those who turned age 70 1/2 in the prior year to take their 1<sup>st</sup> RMD from Traditional, SEP, and SIMPLE IRAs
- 15 IRS deadline to make contributions to your IRA 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)

## JUNE

- 1 Contribution recharacterization requests due to Provident Trust Group
- 1 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 for the prior year
- 30 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