

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	1	2	3	4	5	6	1	2	3	4	5	6			
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13	
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20	
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27	
24	25	26	27	28	29	30	28							28	29	30	31				
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						1			1	2	3	4	5	
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12	
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19	
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26	
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30				
							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	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11	
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18	
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25	
25	26	27	28	29	30	31	29	30	31					26	27	28	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	1	2	3	4	5	6				1	2	3	4		
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11	
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18	
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25	
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31		
31																					

FEBRUARY

- 1 Provident Trust Group mails all Account Owners the following:
 - Forms 1099-R, 1099-INT, 1099-Q, and 1099-SA (as applicable)
 - 2020 Annual Account Statements for SIMPLE IRA owners
 - Notice for Required Minimum Distributions ("RMD") for Traditional, SEP, and SIMPLE IRA clients age 72 or older

MARCH

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

MAY

- 17 IRS deadline to make contributions to your IRA for the prior year *Residents of TX, OK, and LA have an extended contribution deadline of June 15, 2021

JUNE

- 30 Provident Trust Group electronically files the Forms 5498, 5498-ESA, and 5498-SA (as applicable) with the IRS and mails the Forms to Account Owners/ Beneficiaries

SEPTEMBER

- 15 Contribution recharacterization requests due to Provident Trust Group

OCTOBER

- 15 IRS deadline to remove an excess IRA contribution that occurred in the prior year for IRA owners who timely filed their federal income tax return or otherwise received an extension of time to file
- 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 individuals