

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

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 <sup>23</sup> / <sub>30</sub>	24	25	26	27	28	29

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:
  - Forms 1099-R, 1099-INT, 1099-Q, and 1099-SA (as applicable)
  - 2023 Annual Account Statements
  - Notice for Required Minimum Distributions (RMD) for Traditional, SEP, and SIMPLE IRA clients age 72 or older

## MARCH

- 15 Deadline for Partnership LLC and S Corps to set up and contribute to a Solo 401(k)<sup>1</sup>
- 31 Last day to request corrections to your Annual Account Statement
- 31 Completed Fair Market Value (FMV) forms and supporting documents due to Provident Trust Group for FMV amount updates

## APRIL

- 1 Provident Trust Group electronically files the Forms 1099-R, 1099-INT, 1099-Q, and 1099-SA (as applicable) with the IRS
- 15 Deadline for Single LLC and C Corps to set up and contribute to a Solo 401(k) for 2023<sup>2</sup>
- 15 IRS deadline to make contributions to your IRA for the prior year (all 50 states)
- 30 Provident Trust Group mails the Forms 5498-ESA to designated beneficiaries

## MAY

- 31 Provident Trust Group electronically files the Forms 5498, 5498-ESA, and 5498-SA (as applicable) with the IRS and mails the Forms 5498 and 5498-SA 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

- 1 Completed FMV forms requests due to Provident Trust Group for guaranteed processing for 2024 annual statements

This material is provided for general educational and informational purposes only and should not be considered to be legal, tax or investment advice. Provident Trust Group, LLC is a non-discretionary, passive, directed custodian that does not sell or solicit investments and does not provide investment advice or recommendations. Provident Trust Group, LLC is not obligated to review and does not endorse any investment or investment advisor, and individuals are responsible for the investments in their accounts. Consult with a tax and/or financial advisor to determine what may be best for your individual needs.

©2023 Ascensus, LLC. All Rights Reserved. 1464160-PTG-1464161 (11/2023)

<sup>1</sup>If you request and receive an extension, you may have until **September 15, 2024**, or until you file your taxes.

<sup>2</sup>If you request and receive an extension, you may have until **October 16, 2024**, or until you file your taxes.