

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

JANUARY

- 31 Provident Trust Group mails all account owners the following:
 - Forms 1099-R, 1099-INT, 1099-Q, and 1099-SA (as applicable)
 - 2022 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)¹
- 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 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

- 18 Deadline for Single LLC and C Corps to set up and contribute to a Solo 401(k) for 2022²
- 18 IRS deadline to make contributions to your IRA for the prior year (all 50 states)

MAY

- 1 Provident Trust Group mails the Forms 5498-ESA to designated beneficiaries
- 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

- 16 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 2023 annual statements

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¹If you request and receive an extension, you may have until **September 15, 2023**, or until you file your taxes.

²If you request and receive an extension, you may have until **October 16, 2023**, or until you file your taxes.

Please note: If a plan is adopted in 2023 for 2022 you cannot make pre-tax or Roth deferrals, but you can still make employer contributions.