



IMPORTANT DATES & DEADLINES

2025

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January 31, 2025	<ul style="list-style-type: none">Forms 1099-R/1099-SA will be mailed if a distribution was taken in 2024Required Minimum Distribution (RMD) Notice provided to IRA owners aged 73 and older. The information will also be posted to your IRA Club portal.
April 1, 2025	<ul style="list-style-type: none">Forms 5498/5498-SA will be posted to the IRA Club portalIRA Club files electronic 1099-R/1099-SA forms to the IRS for all IRAs and HSAsIf you turned 73 in 2024, you must take your first RMD by this date
April 3, 2025	2025 1st Quarter Statements are posted to the IRA Club portal
April 15, 2025	<p><u>Tuesday, April 15th, has several important deadlines:</u></p> <ul style="list-style-type: none">Personal income tax filing due date for tax year 2024Establish an IRA/HSA for a 2024 ContributionEstablish a Solo 401(k) for a 2024 Employer ContributionPostmark a 2024 tax year contribution to IRA ClubRemove 2024 excess IRA/HSA contributionsRecharacterize 2024 IRA contributions
May 31, 2025	IRA Club files electronic Forms 5498/5498-SA for tax year 2024 to the IRS for all IRAs and HSAs to report contributions, required minimum distributions and the fair market value of the account.
July 3, 2025	2025 2nd Quarter Statements are posted to the IRA Club portal
October 3, 2025	2025 3rd Quarter Statements are posted to the IRA Club portal
October 15, 2025	<p><u>Deadline to:</u></p> <ul style="list-style-type: none">Remove excess IRA/HSA contributions for 2024Recharacterize IRA contributions for 2024Final extended deadline for your personal 2024 tax return
December 31, 2025	<p><u>Last day to:</u></p> <ul style="list-style-type: none">Take your 2025 RMD (Required Minimum Distribution) to avoid an IRS penalty.If you turned 73 in 2024, you must take your second RMD by this date (if you split payments)Convert a Traditional IRA to a ROTH IRAOpen a Solo 401(k) for a 2025 contribution (employee portion due January 31, 2026)
January 5, 2026	2025 4th Quarter Statements are posted to the IRA Club portal