



IMPORTANT DATES & DEADLINES

2026

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January 31, 2026	<ul style="list-style-type: none">Forms 1099-R/1099-SA will be mailed if a distribution was taken in 2025Required Minimum Distribution (RMD) Notice provided to IRA owners aged 73 and older. The information will also be posted to your IRA Club portal.
March 31, 2026	<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 2025, you must take your first RMD by this date
April 1, 2026	2026 1st Quarter Statements are posted to the IRA Club portal
April 15, 2026	<p><u>Wednesday, April 15th, has several important deadlines:</u></p> <ul style="list-style-type: none">Personal income tax filing due date for tax year 2025Establish an IRA/HSA for a 2025 ContributionEstablish a Solo 401(k) for a 2025 Employer ContributionPostmark a 2025 tax year contribution to IRA ClubRemove 2025 excess IRA/HSA contributionsRecharacterize 2025 IRA contributions
May 31, 2026	IRA Club files electronic Forms 5498/5498-SA for tax year 2025 to the IRS for all IRAs and HSAs to report contributions, required minimum distributions, and the fair market value of the account.
July 1, 2026	2026 2nd Quarter Statements are posted to the IRA Club portal
October 1, 2026	2026 3rd Quarter Statements are posted to the IRA Club portal
October 15, 2026	<p><u>Deadline to:</u></p> <ul style="list-style-type: none">Remove excess IRA/HSA contributions for 2025Recharacterize IRA contributions for 2025Final extended deadline for your personal 2025 tax return
December 31, 2026	<p><u>Last day to:</u></p> <ul style="list-style-type: none">Take your 2026 RMD (Required Minimum Distribution) to avoid an IRS penalty.If you turned 73 in 2025, 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 2026 contribution (employee portion due January 31, 2027)
January 4, 2027	2025 4th Quarter Statements are posted to the IRA Club portal