



IMPORTANT DATES & DEADLINES FOR IRAs

DATES & DEADLINES	ACTION
January 6, 2023	2022 4 th Quarter Statements and Form 1099-R are posted to the IRA Club Online Portal.
January 31, 2023	The 2022 Fair Market Valuation form is due if your IRA had any non-cash holdings.
February 1, 2023	IRA Club will <u>mail</u> the paper Form 1099-R if you received an IRA distribution in 2022. Required Minimum Distribution (RMD) Notice is sent to IRA owners aged 72 and older.
March 20, 2023	IRA Club will post a substitute Form 5498 for your records to the IRA Club Online Portal.
March 31, 2023	IRA Club furnishes electronic 1099-R forms to the IRS for all IRAs.
April 3, 2023	2023 1 st Quarter Statements are posted to the IRA Club Online Portal.
April 18, 2023	<p>April 18th has several important deadlines listed below:</p> <ul style="list-style-type: none"> • Personal income tax filing due date for tax year 2022 • Establish an IRA for a 2022 Contribution • Postmark a 2022 tax year contribution to IRA Club • Remove 2022 excess IRA contributions • Recharacterize 2022 IRA contributions • Postmark a 2022 tax year contribution to an HAS • Establish a Solo 401(k) for a 2022 Employer Contribution
May 31, 2023	IRA Club furnishes electronic Form 5498 for tax year 2023 to the IRS for all IRAs to report contributions, required minimum distributions and the fair market value of the account.
July 3, 2023	2023 2 nd Quarter Statements are posted to the IRA Club Online Portal.
October 2, 2023	2023 3 rd Quarter Statements are posted to the IRA Club Online Portal.
October 16, 2023	<p>Deadline to:</p> <ul style="list-style-type: none"> • Remove excess IRA contributions for 2022 • Recharacterize IRA contributions for 2022 • Final extended deadline for your personal 2022 tax return
December 31, 2023	<p>Last Day to:</p> <ul style="list-style-type: none"> • Take your 2023 RMD (Required Minimum Distribution) to avoid a 50% penalty. • Convert a Traditional IRA to a ROTH IRA • Open a Solo 401(k) for a 2023 contribution (employee portion due January 31, 2024)
January 5, 2024	2023 4 th Quarter Statements and 1099-R are posted to the IRA Club Online Portal.