

## Important 2023 401(k) Dates

March 15	Deadline for deposit of employer contributions for S-Corps and Partnerships if not extending tax filing (12/31 fiscal year). If extending, deadline is 9/15/23
April 1	Deadline for Required Minimum Distributions (RMDs) for plan participants that delayed their initial 2022 RMD
April 15	Deadline for deposit of employer contributions for C-Corps and Sole Proprietorships if not extending tax filing (12/31 fiscal year). If extending, deadline is 10/15/23
July 31	Deadline to file Form 5500 and Form 8955-SSA without extension (08/01/23 for 2022 Plan Year with 07/31/23 falling on a Sunday)
Sept. 30	Summary Annual Reports due to Plan Participants if 5500 filing was not extended. If extending, deadline is 12/15/23
Oct. 15	Deadline to file Form 5500 and Form 8955-SSA if extension was filed
Dec. 1	Deadline to provide Safe Harbor Notices and auto-enroll notices (if applicable)
Dec. 31	Deadline for withdrawal of 2023 RMDs

*\*The above deadlines are for Plans with a 12/31 Plan Year End (PYE). For plan deadlines for plans that use an alternate PYE, please contact your TPA, Inc. Consultant.*

