

To help service your retirement plan needs, a list of time sensitive events which occur throughout your plan year is shown below. We trust you will find this timeline beneficial in meeting the **required** data submission deadlines. The highlighted dates require **special attention** to allow INTAC to complete your mandated government filings on time. Please call INTAC at any time if you have questions.

It is essential that you meet the deadlines highlighted below to guarantee fulfillment of government requirements.

Deadline	You Must Submit to INTAC	INTAC will complete	IRS Deadline
1/15/2019	1099 distribution reporting data ¹		
1/31/2019		Forms 1099-R and 945	Forms 1099-R and 945
2/15/2019	Census data for 401(k) plan which require testing		
3/15/2019		ADP/ACP testing and refund calculation	Corrective distribution for failed ADP/ACP without 10% excise tax
3/29/2019			First year age 70 ½ required minimum distributions
4/15/2019			Corrective distribution of excess deferrals – 402(g)
6/28/2019	Complete plan data for timely tax form completion and to avoid a fee for extension (Form 5558)		
7/31/2019		Annual reports and filings	Form 5500 series filings or extension - Form 5558
9/17/2019	Complete plan data for timely tax form completion and to avoid a rush fee		
10/15/2019		Annual reports filings	Extended form 5500 series
11/29/2019	Age 70 ½ required minimum distribution data ²		
12/31/2019		Age 70 ½ distribution calculations	Age 70 ½ distribution calculations

¹ Only for employers that require INTAC to prepare form 1099-R's

² Only for plans with participants age 70½ or older

INTAC Actuarial Services, an Ascensus company, has been providing complete administration and consulting to employer sponsored retirement plans since 1977. INTAC's professional staff of experienced and innovative plan administrators designs, creates and continually refines a wide range of qualified retirement plans. We are committed to meeting our clients' needs by providing these services in a timely, accurate and cost-effective manner.