

Pension Plan Calendar

Win The Great Pension Plan Race To The End Of The Year

As a kid, once back in school, Christmas (less than 4 months away) seemed like forever. Now, as an adult, September is really just a four-month dash to the end of the year. In the Pension Plan world, it's a mad dash!

September 15th	<ul style="list-style-type: none"> • Funding deadline for Pension Plans • Extended due date for Partnership returns
October 1st	<ul style="list-style-type: none"> • New Safe Harbor 401(k) Plans must be at least 3 months long • First date for Safe Harbor Notices for next year
October 15th	<ul style="list-style-type: none"> • Funding deadline for Sole Proprietor Profit Sharing Plans • Extended due date for Form 5500s • PBGC filing deadline for the current year • Extended due date for Corporate returns
November 1st	<ul style="list-style-type: none"> • Primark Benefits sends out year end consulting requests • Contact Primark Benefits if you are considering changes for your plan and changes in your company structure • The usual release date for next year's cost of living adjusted contribution and benefit limitations
December 1st	<ul style="list-style-type: none"> • Final day for handing out the 401(k) Safe Harbor Notice – these notices must be distributed 30 – 90 days before the plan year
December 10th	<ul style="list-style-type: none"> • Primark Benefits' date for sending out Data Requests
December 31st	<ul style="list-style-type: none"> • Corrective distributions for failed ADP prior year must be made • Age 72 Require Minimum Distributions must be completed • Voluntary plan amendments must be signed by year end • Newly installed 401 (k) Plan Documents must be signed by year end

Check out "Low Cost Ways To Improve 401(k) Participation" for additional ways to encourage employees to open 401(k) plans.

Contact:

Current Clients

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New Accounts

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Why Primark Benefits

- ◆ **EXPERIENCE:** We've been in business since 1971
- ◆ **EXPERTISE:** Our credentialed staff are experts and leaders in the field
- ◆ **ACCURACY:** We have rigorous quality control and a compliance dept
- ◆ **ATTENTION:** Your satisfaction is our priority

Also speak with us about how we can coordinate *all* your employee benefits and services including: retirement, health insurance, flex plans, COBRA, and even payroll processing!