

# 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!

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

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

### Contact:

#### Current Clients

650-692-2043

webinfo@primarkbenefits.com

#### New Accounts

833-987-2315

retirewell@primarkbenefits.com

### 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!