

● Horizon Reminder ● IRS Deadline ● Holiday Closures

JANUARY

- 16 Q4 statements available in the client portal
- 31 Horizon Trust Company mails all account owners the Form 1099-R
- 31 1099-R available on the client portal

MARCH

- 31 Horizon Trust Company deadline for 1099-R to be electronically filed with the IRS
- 31 Completed Fair Market Value ("FMV") forms and supporting documents due to Horizon Trust Company for FMV amount updates

APRIL

- 17 Q1 statements available in the client portal
- 18 IRS deadline to make contributions to your IRA for the prior year (all 50 states)
- 18 Last day to take 2022 RMD if you turned 72 in 2022

MAY

- 31 IRS deadline for 5498 to be electronically filed
- 31 Horizon Trust Company mails all account owners Form 5498. The form will also be available in the client portal.

JULY

- 14 Form 5500 signed & filed for the previous fiscal year that follows the calendar year by our Third Party Administrator ("TPA") Cooper Coons.
- 14 Last day to sign 5500 before our TPA files an automatic extension for your plan (5500 Extension Filing Fee applies)
- 17 Q2 statements available in the client portal
- 31 IRS deadline for 5500 to be electronically filed

SEPTEMBER

- 15 Contribution recharacterization requests due to Horizon Trust Company

OCTOBER

- 16 IRS deadline to remove an excess IRA contribution that occurred in the prior year for IRA owners who timely filed their federal income tax return or otherwise received an extension of time to file

- 16 Q3 statements available in the client portal

- 16 Last day to sign 5500 with extension filed by our TPA

DECEMBER

- 18 Horizon Trust Company deadline for RMD submissions to ensure processing by end of year

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