HORIZON TRUST

● Horizon Reminder   ● IRS Deadline   ● Holiday Closures

JANUARY

● **15** Q4 statements available in the client portal

● **30** 1099s available to clients on portal (available by email or mail upon request)

MARCH

● **31** Completed Fair Market Value ("FMV") forms and supporting documents due to Horizon Trust Company for FMV amount updates

● **31** Horizon Trust Company deadline for 1099-R to be electronically filed with the IRS

APRIL

● **1** Last day to take 2025 RMD if you turned 73 in 2025

● **15** Q1 statements available in the client portal

● **15** IRS deadline to make contributions to your IRA for the prior year (all 50 states)

● **15** Late contributions after this date for previous year possible in disaster relief areas depending on approval by IRS

JUNE

● **1** 5498 available to clients on portal (available by email or mail upon request)

● **1** IRS deadline for 5498 to be electronically filed

JULY

● **15** Last day to sign 5500 for previous fiscal year by our Third Party Administrator before automatic extension for the plan (*5500 Extension Filing Fee Applies)

● **15** 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

● **15** Q3 statements available in the client portal

● **15** 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

● **15** Last day to sign 5500 with extension filed by our TPA

DECEMBER

● **15** Horizon Trust Company deadline for RMD submissions to ensure processing by end of year

● **15** Horizon Trust Company deadline for new 401k plan application submissions to ensure plan documents are created and signed for current year

January

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

February

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March

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April

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May

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August

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September

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October

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18	19	20	21	22	23	24
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November

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December

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