

DATES & DEADLINES	ACTION
January 7, 2022	2021 4 th Quarter Statements and Form 1099-R are posted to the IRA Club Online Portal.
February 1, 2022	IRA Club will <u>mail</u> the paper Form 1099-R if you received an IRA distribution in 2021. Required Minimum Distribution (RMD) Notice is sent to IRA owners aged 72 and older.
March 18, 2022	The 2021 Fair Market Valuation form is due if your IRA had any non-cash holdings.
March 21, 2022	IRA Club will post a substitute Form 5498 for your records to the IRA Club Online Portal.
March 31, 2022	IRA Club furnishes electronic 1099-R forms to the IRS for all IRAs.
April 4, 2022	2022 1 st Quarter Statements are posted to the IRA Club Online Portal.
April 15, 2022	<p>April 15th has several important deadlines listed below:</p> <ul style="list-style-type: none"> • Personal income tax filing due date for tax year 2021 • Establish an IRA for a 2021 Contribution • Postmark a 2021 tax year contribution to IRA Club • Remove 2021 excess IRA contributions • Recharacterize 2021 IRA contributions • Postmark a 2021 tax year contribution to an HAS • Establish a Solo 401(k) for a 2021 Employer Contribution
May 31, 2022	IRA Club furnishes electronic Form 5498 for tax year 2021 to the IRS for all IRAs to report contributions, required minimum distributions and the fair market value of the account.
July 1, 2022	2022 2 nd Quarter Statements are posted to the IRA Club Online Portal.
October 3, 2022	2022 3 rd Quarter Statements are posted to the IRA Club Online Portal.
October 15, 2022	<p>Deadline to:</p> <ul style="list-style-type: none"> • Remove excess IRA contributions for 2021 • Recharacterize IRA contributions for 2021 • Final extended deadline for your personal 2021 tax return
December 31, 2022	<p>Last Day to:</p> <ul style="list-style-type: none"> • Take your 2022 RMD (Required Minimum Distribution) to avoid a 50% penalty. • Convert a Traditional IRA to a ROTH IRA • Open a Solo 401(k) for a 2022 contribution (employee portion due January 31, 2023)
January 6, 2023	2022 4 th Quarter Statements and 1099-R are posted to the IRA Club Online Portal.