

DATES & DEADLINES	ACTION
January 8, 2021	2020 4 th Quarter Statements and Form 1099-R are posted to the IRA Club Online Portal.
February 1, 2021	IRA Club will <u>mail</u> the paper Form 1099-R if you received an IRA distribution in 2020. Required Minimum Distribution (RMD) Notice is sent to IRA owners aged 72 and older.
March 19, 2021	The 2020 Fair Market Valuation form is due if your IRA had any non-cash holdings.
March 22, 2021	IRA Club will post a substitute Form 5498 for your records to the IRA Club Online Portal.
March 31, 2021	IRA Club furnishes electronic 1099-R forms to the IRS for all IRAs.
April 2, 2021	2021 1 st Quarter Statements are posted to the IRA Club Online Portal.
April 15, 2021	<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 2020 • Establish an IRA for a 2020 Contribution • Postmark a 2020 tax year contribution to IRA Club • Remove 2020 excess IRA contributions • Recharacterize 2020 IRA contributions • Postmark a 2020 tax year contribution to an HAS • Establish a Solo 401(k) for a 2020 Employer Contribution
May 31, 2021	IRA Club furnishes electronic Form 5498 for tax year 2020 to the IRS for all IRAs to report contributions, required minimum distributions and the fair market value of the account.
July 2, 2021	2021 2 nd Quarter Statements are posted to the IRA Club Online Portal.
October 4, 2021	2021 3 rd Quarter Statements are posted to the IRA Club Online Portal.
October 15, 2021	<p>Deadline to:</p> <ul style="list-style-type: none"> • Remove excess IRA contributions for 2020 • Recharacterize IRA contributions for 2020 • Final extended deadline for your personal 2020 tax return
December 31, 2021	<p>Last Day to:</p> <ul style="list-style-type: none"> • Take your 2021 RMD (Required Minimum Distribution) to avoid a 50% penalty. • Convert a Traditional IRA to a ROTH IRA • Open a Solo 401(k) for a 2021 contribution (employee portion due January 31, 2022)
January 7, 2022	2021 4 th Quarter Statements and 1099-R are posted to the IRA Club Online Portal.