

YEAR- END RESPONSIBILITY	PARTY RESPONSIBLE	YEAR-END DATE				
		June 30th (6/30)	July 31st (7/31)	Aug 31st (8/31)	Sept 30th (9/30)	Dec 31st (12/31)
Request for year-end census information is sent out to Plan Sponsors	ADMIN Partners	7/1	8/1	9/1	10/1	1/1
Census data sent to ADMIN Partners so 402(g) limits, 415 limits and non-discrimination testing, can be performed.	Plan Sponsor	8/15	9/15	10/15	11/15	2/15
Form 5500 due on the DOL's efast website (Unless 5588 Extension has been filed)	Plan Sponsor and ADMIN Partners	1/31 (If if 5558 Extension was filed, the 5500 is due on 4/15.)	2/28 (If if 5558 Extension was filed, the 5500 is due on 5/15.)	3/31 (If if 5558 Extension was filed, the 5500 is due on 6/15.)	4/30 (If if 5558 Extension was filed, the 5500 is due on 7/15.)	7/31 (If if 5558 Extension was filed, the 5500 is due on 10/15.)
For plans that are filing as a Large Plan (over 100 participants), a draft 5500 will be made available for the plan's auditor. The auditor will review the draft 5500 and make any changes they see fit, and return to ADMIN Partners to update the 5500 prior to submission.	ADMIN Partners and Plan Auditors	November to January. Auditor feedback due by end of December.  (If a 5558 Extension was filed, the auditor will have review and return the final 5500 by March so the extended deadline of April 15th is met).	December to February. Auditor feedback due by end of January.  (If a 5558 Extension was filed, the auditor will have review and return the final 5500 by April so the extended deadline of May 15th is met).	January to March. Auditor feedback due by end of February.  (If a 5558 Extension was filed, the auditor will have review and return the final 5500 by May so the extended deadline of June 15th is met).	February to April. Auditor feedback due by end of March.  (If a 5558 Extension was filed, the auditor will have review and return the final 5500 by April so the extended deadline of July 15th is met).	May to July. Auditor feedback due by end of June.  (If a 5558 Extension was filed, the auditor will have review and return the final 5500 by September so the extended deadline of October 15th is met).
Form 8955-SSA due to the IRS (Unless 5588 Extension has been filed)	Plan Sponsor and ADMIN Partners	1/31 (If 5558 Extension was filed, the 8955-SSA is due on 4/15)	2/28 (If 5558 Extension was filed, the 8955-SSA is due on 5/15)	3/31 (If 5558 Extension was filed, the 8955-SSA is due on 6/15)	4/30 (If 5558 Extension was filed, the 8955-SSA is due on 7/15)	7/31 (If 5558 Extension was filed, the 8955-SSA is due on 10/15)
Summary Annual Report due to participants (due 9 months after plan year end or 2 months after filing Form 5500)	Plan Sponsor	3/31 (If 5558 Extension was filed, the SAR is due on 6/15)	4/30 (If 5558 Extension was filed, the SAR is due on 7/15)	5/30 (If 5558 Extension was filed, the SAR is due on 8/15)	6/30 (If 5558 Extension was filed, the SAR is due on 9/15)	9/30 (If 5558 Extension was filed, the SAR is due on 12/15)
Universal Availability (provide all employees with meaningful opportunity to participant in the plan.)	Plan Sponsor	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing
408(b)2 Disclosures sent out to ERISA Plans	ADMIN Partners	5/1 - 6/1	6/1 - 7/1	7/1 - 8/1	8/1 - 9/1	11/1 - 12/1

