

## JANUARY

- 31 The following documents are uploaded to each clients portal:
- 2023 Annual Account Statement – this document includes the 2023 year-end Fair Market Value (FMV)
  - IRS Form 1099-R if you took a distribution in 2023

## MARCH

- 15 Last day to set up and contribute to a Solo 401(k) for Partnership LLCs and S Corps for 2023
- 31 Digital Trust electronically files the Form 1099-R with the IRS
- 31 Last day to request corrections to your 2023 Annual Account Statement
- 31 Last day to submit FMV Forms and supporting documents to Digital Trust for 2023 FMV amount updates

## APRIL

- 15 Last day to set up and contribute to a Solo 401(k) for Single LLCs and C Corps for 2023

## MAY

- 31 Digital Trust electronically files the Form 5498 with the IRS, and the Form is uploaded to each client's document center

## JULY

- 1 Reminder to conduct an annual mid-year review of your Solo 401(k) account(s) and investment(s) including reviewing and updating your beneficiary designation and your contact information

## OCTOBER

- 31 Completed RMD requests due to Digital Trust for guaranteed processing of RMDs and/or Charitable Distributions by 12/31\*

## DECEMBER

- 1 Completed FMV Form requests due to Digital Trust for guaranteed processing for 2024 Annual Account Statements
- 31 IRS deadline to make Solo 401(k) contributions for 2024
- 31 Completed RMD requests for 2024 must be submitted to Digital Trust before the 12/31/2024 deadline to comply with IRS rules

\*RMD requests received after this deadline are not guaranteed to be processed by 12/31/2024 to meet RMD and/or Charitable Distribution IRS requirements.

Regarding IRS Form 5500:

- Please be sure to review your plan documents to ensure timely submission of IRS Form 5500. It is the responsibility of the plan participant to complete this Form, the Custodian (Digital Trust) will not complete this form on behalf of the plan.

# Key Dates to Mark in Your 2024 Calendar for Solo 401(k)

JAN	FEB	MAR
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