



To help service your retirement plan needs, a list of time sensitive events which occur throughout your plan year is shown below. We trust you will find this timeline beneficial in meeting the **required** data submission deadlines. The highlighted dates require **special attention** to allow Intac to complete your mandated government filings on time. Please call Intac at any time if you have questions.

Annual Timeline for Retirement Plans (Dec. 31, 2010 Year End Plans)

It is essential that you meet the deadlines highlighted below in order to guarantee fulfillment of government requirements.

Deadline	You Must Submit to Intac	Intac will complete	IRS Deadline
1/15/2010	1099 distribution reporting data ¹		
2/1/2010		Forms 1099-R and 945	Forms 1099-R and 945
2/19/2010	Census data for 401 (k) plan which require testing		
3/15/2010		ADP/ACP testing and refund calculation	Corrective distribution for failed ADP/ACP without 10% excise tax
4/1/2010			First year age 70½ required minimum distributions – <i>Defined Benefit Plans ONLY</i>
4/15/2010			Corrective distribution of excess deferrals- 402(g)
6/30/2010	Complete plan data to avoid a rush fee		
7/31/2010		Annual reports and filings	Form 5500 series filings or extension- Form 5558
9/17/2010	Complete plan data for timely tax form completion		
10/15/2010		Annual reports and filings	Extended form 5500 series
12/01/2010	Age 70½ required minimum distribution data ²		
12/31/2010		Age 70½ distribution calculations	Age 70½ distribution calculations

¹ Only for employers that require Intac to prepare form 1099-R's ² Only for plans with participants age 70½ or older