

2024

IRA Calendar

Invest the Preferred Way

Holiday Schedule

Preferred Trust Office Closed

- New Years Day..... Jan 1
- MLK Day..... Jan 15
- Presidents Day..... Feb 19
- Memorial Day..... May 27
- Juneteenth..... Jun 19
- Independence Day..... July 4
- Labor Day..... Sept 2
- Columbus Day..... Oct 14
- Veterans Day..... Nov 11
- Thanksgiving Day..... Nov 28
- Day after Thanksgiving..... Nov 29
- Christmas Day..... Dec 25



January

Jan 31: 2023 Tax Docs are uploaded to client portal.

February

- No IRS requirements -

If you haven't made your 2023 IRA Contribution, you still can!

March

March 31: 2023 1099-R's are submitted to IRS by Preferred Trust.

March 31: 2023 Account Statements are available in the client portal.

April

April 1: RMD Deadline if you turned 72 in 2023 and delayed your first RMD until 2024.

April 15: Deadline to file 2023 tax returns & last day to max out contributions for 2023.

May

May 31: 2023 5498's are submitted to IRS by Preferred Trust.

June

- No IRS requirements -

Have you made your annual RMD?

July

- No IRS requirements -

Conduct a mid-year review of your IRA Investments.

August

- No IRS requirements -

Have you made your annual contribution?

September

- No IRS requirements-

Review and Update Account information: beneficiaries, email, address etc.

October

Precious Metals Invoicing will be sent to all applicable clients.

November

- No IRS requirements -

Talk to a Financial Advisor about retirement strategy for 2025.

December

Dec 1: Final Precious Metal Invoice Reminder.

Schedule RMD for next year (if applicable).