You're Invited: 2025 Year-End Administration Kickoff Webinar

Year-end administration is right around the corner, and we'd like to help you get a clear, organized start. Join us for our **Year-End Administration Kickoff Webinar,** where we'll walk through the process, share key updates, and answer your questions.

Webinar Dates

- January 6 at 2 p.m. EST
- January 12 at 11 a.m. EST

[Register Now](#)

Why Attend

Year-end data submission **opens January 5**, giving you access to **submit your census data and complete the annual questionnaire.** This webinar gives you a clear understanding of the year-end process, what's expected, and how to make the most of the new tools available this year. Whether this is familiar territory or your first time navigating year-end, you'll walk away with practical guidance and a smoother path forward.

What You'll Learn

- How to submit your census data
- Tips for completing the year-end questionnaire
- How and why additional data requests may be created
- *New:* Project status tracking in the Client Portal for real-time updates on compliance testing and Form 5500
- *New:* Secure report delivery through the Client Portal instead of email attachments
- Key deadlines to keep your plan on track
- Q&A

Important Dates

Milestone	Date
Year-end data collection kickoff	January 5
Live webinars	January 6 and 12

Census and questionnaire submission deadlines	
ADP Tested	February 13
EACA ADP Tested	May 22
Non Tested	May 22
Recordkeeper refund processing deadlines	
ADP Tested	Generally five business days before refund deadline
EACA ADP Tested	Generally five business days before refund deadline
Non ADP Tested	Not applicable
ADP/ACP IRS refund deadlines	
ADP Tested	March 13*
EACA ADP Tested	June 30
Form 5500 deadlines	
Form 5500 filing deadline	July 31**
Form 5500 deadline to submit audited financials	October 8
Form 5500 extended filing deadline	October 15
Defined Benefit / Cash Balance specific deadlines	
Census & questionnaire submission deadline	August 22

Contribution funding	September 15
AFTAP certification	September 30
PBGC filing (if applicable)	October 15

*IRS deadline is Sunday, March 15, therefore refunds must be processed by Friday, March 13.
**We will automatically prepare an extension for any plans not filed by July 23.

If you have questions about what's being communicated, please contact your Retirement Plan Specialist. We look forward to helping you start the process with clarity and confidence.