

Your 2025 cash balance plan contribution documentation is required by **June 15** in order to prepare and file your Form 5500 by the July 31 deadline.

To submit, log in to the [Client Portal](#) and complete the **Contribution Verification** task by uploading an asset statement showing the dates and amounts of all contributions you intend to deduct on your 2025 tax return.

If documentation is not received by June 15, we will file a Form 5558 extension on your behalf and a \$125 extension filing fee will apply.

If you plan to contribute later in 2026, no action is needed now. However, we recommend contributions be made no later than September 10 to ensure funds are deposited into the trust by the September 15 deadline.

If you have questions or need help accessing the portal, please contact your Retirement Plan Specialist, [RPS Name & Email].